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Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

AUTOMOTIVE

Dollar sales of 924 automotive wholesalers -- identical establishments accounting for 33 percent of the total business of all service and limited-function automotive wholesalers in 1935, the latest year covered by a regular business census -- increased 2.9 percent in the second quarter over the first quarter of 1938, but were 38.9 percent lese than sales for the second quarter of 1937. Considering the year 1937 as a whole, their sales were 10.8 percent above 1936, and 44.9 percent higher than for 1935.

In addition to the 924 wholesalers, 509 sales branches, owned by manufacturers of automobiles and equipment and operated primarily for the disposal of their products, are included in this Survey. Sales of these branchee increased 9.3 percent in the second quarter over the first quarter of this year, but were 46.3 percent under the total for the corresponding period of 1937. Their sales for the year 1937 as a whole, were 14.8 percent above 1936, and 43.5 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Businese.

Of the 924 wholesalers, 64 are engaged primarily in distributing automobiles and other motor vehicles, 823 in the automotive equipment business and 37 specialize in tires and tubes. Dollar sales of automotive equipment houees and of distributors of tires and tubes increased 14.2 percent and 8.8 percent, respectively, in the second quarter over the first quarter of this year, while the business of automobile and other motor vehicle establiehments was off 6.4 percent. Sales of all classee of establishments show decreases when the second quarter of 1938 is compared with the same period of 1937.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for eeasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers				Manufacturers' sales branches			
	Total	Automobile and other motor vehicles	Automotive equipment	Tires and tubes	Total	Automobiles and other motor vehicles	Automotive equipment	Tires and tubes
Number of establiehmente included	924	64	823	37	509	315	43	151
Percent increase (+) or decrease (-) in sales								
1st Qr. to 2nd Qr. 1937	+21.3	+28.4	+18.0	-15.0	+31.2	+36.3	+ 6.7	- 3.3
2nd Qr. to 3rd Qr. 1937	-20.1	-38.4	+ 6.0	+29.5	-24.5	-29.7	+19.5	+24.3
3rd Qr. to 4th Qr. 1937	+ 4.2	+10.6	- 3.7	+ 6.9	- 0.8	+ 1.7	- 8.5	-14.5
4th Qr. 1937 to 1st Qr. 1938	-28.7	-26.1	-28.5	-42.9	-34.4	-35.4	-31.2	-27.9
1st Qr. 1938 to 2nd Qr. 1938	+ 2.9	- 6.4	+14.2	+ 8.8	+ 9.3	+ 6.0	+10.7	+28.8
1st Qr. 1938 vs. 1st Qr. 1937	-28.1	-35.3	-13.9	-32.9	-35.6	-37.0	-19.7	-25.9
2nd Qr. 1938 vs. 2nd Qr. 1937	-38.9	-52.9	-16.6	-14.1	-46.3	-51.1	-16.7	- 1.3

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks, both for wholesale distributors and for manufacturers' sales branches, when 1937 is compared with 1935. Dollar sales of the 924 wholesalers were up 44.9 percent as compared with a 25.8 percent riee in pay roll, and a 35.3 percent increase

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in the value of stocks on hand at the end of the year. The 509 manufacturers' sales branches show a 43.5 percent increase in sales, 33.3 percent rise in pay roll, and 59.7 percent increase in stocks. Automobile and other motor vehicle establishments show the largest gains in sales (62.2% for distributors and 45.7% for manufacturers' sales branches) followed by those specializing in tires and tubes (47.2% for distributors and 30.2% for branches).

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

Kind of business	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (924 establishments)	44.9	25.8	35.3
Automobiles and other motor vehicles (64 establishments)	62.2	49.5	104.6
Automotive equipment (823 establishments)	24.2	17.6	24.5
Tires and tubes (37 establishments)	47.2	23.3	- 17.3
Manufacturers' sales branches (509 establishments)	43.5	33.3	59.7
Automobiles and other motor vehicles (315 establishments)	45.7	39.2	71.4
Automotive equipment (43 establishments)	17.4	25.9	34.8
Tires and tubes (151 establishments)	30.2	18.3	29.8

These and other facts pertaining to sales, pay roll and stocks of the establishments included herein are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 924 wholesalers and 509 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale automotive business. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers and branches that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for only a negligible portion of the wholesale automotive business, those with sales for the year 1935 of less than $25,000 were also omitted.

33⅓ Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all wholesalers contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale automotive houses for the entire year of 1935 and which still operate in a similar manner.

The importance of those included is shown by the fact that the 924 wholesalers (service and limited-function) represented 16 percent of the number and accounted for 33 percent of the total sales of all automotive wholesalers in 1935. Likewise, the 509 manufacturers' sales branches represented 57 percent of the number of branches and 75 percent of their sales for the year 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample, both of the establishments and sales, is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS, 1937-38 — WHOLESALE DISTRIBUTION

AUTOMOTIVE

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES YEAR 1937	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR 1937 TO 2ND QR 1938
	ESTABLISHMENTS %	NET SALES %		(add 000)	1ST QR. Jan. 1 Mar. 31	2ND QR June 30	3RD QR. July 1 Sept. 30	4TH QR Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	16	33	924	$370,166	$98,333	$107,114	$85,567	$89,152	$63,546	$65,409	-28.1	-38.9
Automobiles and other motor vehicles	16	33	64	204,203	51,685	56,389	40,890	45,239	33,435	31,290	-35.3	-52.9
Automotive equipment	17	31	823	134,817	29,086	34,250	36,291	34,990	24,995	28,554	-13.9	-16.6
Tires and tubes	9	41	37	31,146	7,628	6,475	6,386	8,963	5,116	5,565	-32.9	-14.1
Automobiles and other motor vehicles												
New England	18	16	6	5,997	1,748	1,748	1,400	1,101	959	1,172	-45.1	-33.0
Middle Atlantic	20	43	15	70,016	16,514	22,427	14,869	16,206	15,092	12,405	- 8.6	-44.7
East North Central	18	47	17	89,602	23,568	30,688	16,621	18,725	12,102	11,972	-48.6	-61.0
West North Central	20	25	12	10,889	2,507	3,500	2,483	2,399	1,487	1,863	-40.7	-46.8
South Atlantic	14	24	5	7,214	1,926	2,240	1,509	1,539	960	1,192	-50.2	-47.0
Pacific	10	22	5	15,446	4,190	4,261	3,101	3,894	2,221	2,146	-47.0	-49.6
Other divisions	8	11	4	5,099	1,432	1,516	907	1,244	674	540	-52.9	-64.4
Automotive equipment												
New England	17	28	41	5,742	1,119	1,499	1,590	1,534	977	1,248	-12.7	-16.7
Middle Atlantic	17	31	140	28,137	5,907	7,256	7,514	7,460	5,241	5,892	-11.3	-18.8
East North Central	19	35	230	37,083	7,997	9,270	9,807	10,029	6,425	7,326	-19.5	-21.0
West North Central	14	27	98	12,524	3,386	3,787	4,416	4,045	2,840	3,224	-16.1	-14.9
South Atlantic	15	28	62	9,526	2,164	2,340	2,509	2,513	1,997	2,038	- 7.7	-12.9
East South Central	14	20	25	2,871	648	741	715	767	633	642	- 2.3	-13.4
West South Central	13	24	51	9,407	2,000	2,220	2,716	2,534	1,938	2,078	- 3.5	- 6.5
Mountain	14	30	27	5,768	1,296	1,670	1,562	1,240	915	1,185	-29.4	-29.0
Pacific	23	42	159	20,296	4,521	5,488	5,460	4,827	4,069	4,921	-10.0	-10.3
Tires and tubes												
Middle Atlantic	15	60	13	23,953	5,892	4,437	6,349	7,075	3,718	3,792	-36.9	-14.5
West South Central	14	48	5	2,163	507	609	692	355	405	515	-20.1	-15.4
Pacific	8	11	6	951	159	200	217	375	137	191	-13.8	- 4.5
Other divisions	6	18	13	4,779	1,064	1,229	1,128	1,358	856	1,067	-19.5	-13.2
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	57	75	509	1,261,094	317,713	416,843	314,588	211,950	204,745	223,614	-35.6	-46.3
Automobiles and other motor vehicles	73	81	315	1,186,291	296,193	396,555	284,567	269,076	173,892	184,282	-39.0	-51.1
Automotive equipment	22	12	43	6,431	1,652	1,518	1,814	1,660	1,423	1,264	-19.7	-16.7
Tires and tubes	56	62	151	168,986	40,097	38,770	48,207	41,214	29,711	38,868	-25.9	- 1.3
Automobiles and other motor vehicles												
New England	1/	1/	23	24,223	7,321	11,833	7,472	7,597	3,771	5,457	-48.5	-53.9
Middle Atlantic	--	--	78	258,291	54,168	85,005	58,682	61,036	34,735	42,406	-35.9	-50.1
East North Central	--	--	91	315,055	71,614	100,274	67,732	70,449	41,403	43,649	-42.2	-56.5
West North Central	--	--	41	137,324	31,561	45,409	31,536	28,818	24,457	29,297	-22.5	-35.5
South Atlantic	--	--	31	119,854	33,825	36,548	24,026	25,435	18,953	16,188	-44.0	-50.4
East South Central	--	--	13	45,870	8,452	10,511	12,081	14,826	7,257	7,659	-13.5	-48.1
West South Central	--	--	23	129,517	28,683	36,417	30,030	30,387	23,284	16,336	-28.8	-55.1
Mountain	--	--	11	25,420	6,092	7,069	7,831	5,028	4,751	5,020	-22.0	-29.0
Pacific	34	100	34	130,823	30,569	35,469	25,777	27,466	15,266	17,170	-50.0	-51.6
Automotive equipment												
Middle Atlantic	--	--	8	1,561	364	391	415	401	320	346	-12.1	- 9.8
East North Central	--	--	10	1,305	306	379	347	273	169	240	-26.2	-36.7
West North Central	--	--	10	1,286	297	173	405	441	213	186	-10.1	+ 7.5
Other divisions	--	--	15	2,293	516	585	647	545	420	492	-18.6	-15.9
Tires and tubes												
New England	--	--	9	9,125	2,252	2,218	2,466	2,189	1,659	1,907	-26.3	-14.0
Middle Atlantic	--	--	29	32,917	7,815	7,392	9,495	8,215	5,823	7,469	-25.5	+ 1.0
East North Central	--	--	28	27,352	9,530	6,959	10,008	6,855	5,875	7,596	-38.4	-15.2
West North Central	--	--	24	24,612	6,144	6,028	8,113	6,327	5,116	6,781	-16.7	-12.5
South Atlantic	--	--	18	20,552	4,796	4,903	5,714	5,139	3,590	4,884	-25.1	- 0.4
East South Central	--	--	7	5,031	1,094	1,062	1,428	1,447	906	1,077	-17.2	+ 1.4
West South Central	--	--	17	16,717	3,596	3,356	5,108	4,657	3,421	3,987	- 4.9	-11.6
Mountain	--	--	4	2,799	575	642	865	717	433	680	-24.7	+ 5.9
Pacific	--	--	15	17,182	4,295	4,010	4,688	4,189	2,888	3,907	-32.8	- 2.6

+ INCREASE - DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del, D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

AUTOMOTIVE

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		No. OF ESTAB-LISH-MENTS INCLUD-ED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)			STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB-LISH-MENTS %	NET SALES %		1937	1936	1935	1937	1936	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS															
UNITED STATES	16	33	924	$370,166	$334,093	$255,546	$28,685	$28,794	$41,729	$34,958	$30,838	44.9	25.8	32.3
Automobiles and other motor vehicles	16	33	64	204,203	181,405	125,877	8,546	5,716	11,594	7,497	5,667	62.2	49.5	104.6
Automotive equipment	17	31	823	134,517	126,674	108,302	19,124	16,255	27,788	25,182	22,329	24.2	17.6	24.5
Tires and tubes	9	41	37	31,446	26,014	21,367	1,015	823	2,347	2,276	2,837	47.2	23.3	17.3
Automobiles and other motor vehicles															
New England	18	16	6	5,997	5,767	4,843	350	316	463	381	335	23.8	10.8	243.0
Middle Atlantic	20	43	15	70,016	60,089	47,546	4,031	2,437	5,000	3,026	1,971	84.4	65.4	218.3
East North Central	18	47	17	89,602	75,018	51,158	2,150	1,614	3,103	2,116	2,174	75.2	33.2	42.7
West North Central	20	25	12	10,829	11,899	9,350	442	348	886	635	450	15.8	27.0	92.6
South Atlantic	14	28	5	7,214	7,665	5,840	563	230	502	344	383	23.5	57.8	31.1
Pacific	10	22	5	15,446	15,555	15,759	1,067	681	1,471	977	846	12.3	56.7	73.9
Other divisions	8	11	4	5,099	5,672	5,381	143	90	169	118	98	50.8	58.9	72.4
Automotive equipment															
New England	17	38	41	5,742	5,551	5,034	751	721	1,266	1,173	1,127	14.1	2.7	12.3
Middle Atlantic	17	33	140	38,157	36,459	31,669	3,816	3,191	4,980	4,497	4,048	29.8	19.6	21.5
East North Central	19	35	230	37,083	35,140	29,344	5,598	4,706	7,471	6,922	5,881	26.8	19.0	27.0
West North Central	14	25	88	15,634	15,181	13,178	2,121	1,856	5,533	5,152	2,904	18.6	14.3	26.0
South Atlantic	15	28	62	9,226	9,173	7,908	1,334	1,158	1,941	1,668	1,584	20.5	15.2	20.8
East South Central	14	20	25	2,871	2,698	2,304	479	404	677	607	550	24.6	18.6	30.4
West South Central	13	24	51	9,460	8,086	7,071	1,340	1,113	1,831	1,592	1,469	33.8	20.4	24.6
Mountain	14	30	27	5,768	5,147	4,239	688	570	1,251	1,114	990	36.1	19.5	26.9
Pacific	23	42	159	20,296	19,259	17,655	3,005	2,826	5,018	4,497	4,005	15.0	18.9	25.5
Tires and tubes															
Middle Atlantic	15	60	13	23,755	19,909	16,380	497	478	1,462	1,586	1,904	45.0	4.0	23.2
West South Central	14	49	5	2,163	1,976	1,480	142	94	297	160	205	46.1	51.1	44.8
Pacific	8	11	6	751	652	514	114	84	101	68	97	53.6	35.7	51.2
Other divisions	6	18	13	4,779	3,477	3,018	262	167	487	442	651	58.3	56.9	25.2
MANUFACTURERS' SALES BRANCHES (with stocks)															
UNITED STATES	57	75	509	1,761,094	1,185,514	948,702	40,402	30,307	69,840	61,178	43,729	43.5	33.3	59.7
Automobile and other motor vehicles	75	81	315	1,186,391	1,036,368	814,019	30,026	21,573	53,702	45,968	31,340	45.7	39.2	71.4
Automotive equipment	28	12	43	6,415	5,581	5,465	691	549	1,089	1,051	908	17.4	25.9	34.8
Tires and tubes	56	62	151	168,288	143,570	129,280	9,685	8,185	15,049	14,159	11,591	30.2	18.3	29.8
Automobiles and other motor vehicles															
New England	1/	1/	25	34,283	29,313	23,586	1,183	937	2,086	1,949	1,070	45.1	19.9	95.0
Middle Atlantic	--	--	78	258,891	236,185	177,167	6,917	5,250	10,794	9,757	6,980	46.1	31.8	54.0
East North Central	--	--	61	315,069	269,613	215,175	7,140	5,886	9,660	10,405	7,530	46.4	21.3	28.3
West North Central	--	--	41	137,324	133,038	97,290	3,867	2,708	6,509	5,132	5,155	41.1	42.8	26.3
South Atlantic	--	--	31	119,804	94,694	83,599	3,539	2,092	4,990	3,993	2,658	61.8	76.1	87.7
East South Central	--	--	13	45,870	43,809	39,788	879	631	1,971	1,334	773	15.3	39.5	76.9
West South Central	--	--	25	129,517	118,838	91,054	2,518	1,825	4,891	4,024	2,191	42.2	38.0	123.2
Mountain	--	--	11	28,480	20,214	12,998	981	673	1,772	1,826	919	95.6	45.8	92.8
Pacific	--	--	34	120,223	111,030	82,868	3,063	2,254	11,622	10,248	4,118	45.1	35.9	182.2
Automotive equipment															
Middle Atlantic	--	--	8	1,561	1,523	1,332	278	199	297	263	192	17.2	39.7	54.7
East North Central	--	--	10	1,305	1,362	1,152	152	107	162	185	181	13.3	53.4	33.9
West North Central	--	--	10	1,256	1,284	1,116	102	92	144	170	113	12.5	10.9	27.4
Other divisions	--	--	15	2,293	1,412	1,865	179	151	486	433	368	23.1	18.5	32.2
Tires and tubes															
New England	--	--	9	9,125	8,289	8,694	597	545	837	767	897	5.0	9.5	-6.7
Middle Atlantic	--	--	29	32,917	27,253	25,665	2,014	1,755	2,708	2,598	2,087	28.3	14.8	33.6
East North Central	--	--	28	37,332	31,884	28,047	1,951	1,682	2,504	2,588	1,784	33.2	16.0	40.4
West North Central	--	--	24	26,612	23,288	22,018	1,784	1,419	3,068	2,972	2,836	20.9	25.7	36.8
South Atlantic	--	--	18	20,553	17,365	14,802	963	794	1,419	1,254	1,073	38.9	21.3	32.2
East South Central	--	--	7	5,031	4,160	3,180	213	177	556	494	300	58.2	20.5	86.0
West South Central	--	--	17	15,717	12,859	11,293	816	668	1,664	1,553	1,291	45.7	22.2	31.4
Mountain	--	--	4	2,799	2,353	1,812	189	142	285	273	170	54.5	33.1	67.6
Pacific	--	--	15	17,182	14,519	13,609	1,158	1,003	2,012	1,824	1,731	26.3	15.5	16.2

\- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Retail Distribution

AUTOMOTIVE ACCESSORY, TIRE AND BATTERY DEALERS (EXCEPT CHAINS)

Nearly 700 independent automotive accessory, tire and battery dealers throughout the country, with aggregate sales in 1937 of $25,989,000, reported to the Bureau of the Census that their sales for the second quarter of 1938 increased 26.3 percent over the preceding quarter. Sales during the first half of 1938 were off 6.3 percent as compared with their sales for the same period of 1937. The first quarter of 1938 showed a loss of 6.2 percent and the second quarter a loss of 6.3 percent in comparison with the corresponding quarters of 1937. Compared with 1935, the latest year covered by a regular Business Census, their 1937 sales represent an increase of 27.5 percent. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in a preliminary report issued in connection with the Census Survey of Business for 1937-38.

The classification "Automotive Accessories, Tires and Batteries", for Census purposes, represents stores handling all kinds of automobile accessories, tires and batteries. It also includes tire shops selling new and used tires and tubes and maintaining facilities for tire repairs, shops selling batteries and doing some battery and ignition service work, but does not include establishments whose receipts from repairs and services are in excess of the receipts from sales of merchandise.

Sales

All geographic divisions and all States, with the exception of Montana, show sales increases from 1935 to 1937. For the first half of 1938 all geographic divisions show decreases as compared with the first half of 1937, ranging from 3.0 percent for the Middle Atlantic and Pacific Divisions to 13.8 percent for the East South Central Division.

Pay Roll

Of the 685 stores included in the Survey, 79 reported no paid employees. The remaining 606 stores reported pay roll, exclusive of the services of proprietors, to the amount of $3,693,000 for 1937, representing an increase of 23.7 percent over the total for 1935, and $1,749,000 for the first half of 1938, an increase of 1.2 percent as compared with the same period of 1937. A summary comparison of pay roll and sales follows:

	Percent Change	
	Sales	Pay Roll
Year 1937 compared with 1935	+27.5	+23.7
First half 1938 compared with first half 1937	- 6.3	+ 1.2

Size of Sample

The stores included in the Survey constitute a sample of 11 percent in sales and 6 percent in number of all automotive accessory, tire and battery stores (except units of chains) shown in the 1935 Census. A summary follows:

	Stores	Sales in 1935
1935 Census	10,890	$186,993,000
1937 Survey	685	20,384,000
Percent Sample	6%	11%

Compared with the above average size of sample, the proportion of coverage for principal cities is as follows:

City	Size of Sample		City	Size of Sample	
	Stores %	Sales %		Stores %	Sales %
Baltimore	4	4	Milwaukee	8	19
Boston	7	21	New York	7	11
Buffalo	13	27	Philadelphia	6	6
Chicago	6	9	Pittsburgh	10	7
Cleveland	5	5	San Francisco	11	25
Detroit	7	16	St. Louis	8	8
Los Angeles	7	12			

Attached are tables showing sales and pay roll for each quarter by geographic divisions, States, and principal cities. Separate figures are not shown in the tables for States and cities with less than five stores reporting, or for which the sample represents less than eight percent of the 1935 sales. However, data for the States omitted are included in the totals of their respective geographic divisions.

Scope of Survey

The data contained in this report were supplied by 685 automotive accessory, tire and battery stores, other than units of chains, which submitted returns for the current Census Survey of Business prior to the closing date. This report is not intended to present a complete picture of the retail automotive accessory, tire and battery trade. The canvass for the Survey was conducted by mail from lists composed only of stores included in the 1935 Census of Business. Stores with 1935 sales of less than $5,000, and those which came into existence since 1935 were not canvassed, and those which have gone out of business necessarily are omitted. Reporting for this Survey was voluntary; hence, some stores failed to cooperate or delayed their returns beyond the closing date. For convenience in evaluating the importance of the stores included, percentage columns are carried in the accompanying sales table which show the weight of sample by States.

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This is one of a series of retail reports issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other kinds of business, and later by more detailed studies.

The current Census Survey of Business includes wholesale as well as retail trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Cosnell, Chief Statistician, who was also in charge of previous Business Censuses. Retail Trade reports are prepared under the immediate supervision of James O. Reid.

CENSUS SURVEY OF BUSINESS: 1937-38 — RETAIL DISTRIBUTION

AUTOMOTIVE ACCESSORY, TIRE AND BATTERY DEALERS (except chains)

TABLE 1.–SALES, BY QUARTERS FOR 1938(FIRST HALF)AND 1937; AND FOR THE YEAR 1935

FOR IDENTICAL STORES, BY GEOGRAPHIC DIVISIONS, STATES AND PRINCIPAL CITIES.

DIVISION, STATE AND CITY*	SIZE AND PROPORTION OF SAMPLE				SALES BY QUARTERS, 1937-38 (add 000)						YEAR 1937		FIRST HALF 1938	
	NUMBER OF STORES INCLUDED IN 1937-38 SURVEY	PERCENT OF SUCH STORES TO ALL STORES IN 1935 CENSUS	1935 SALES OF STORES INCLUDED IN 1937-38 SURVEY (add 000)	PERCENT OF SUCH SALES TO ALL SALES IN 1935 CENSUS	FIRST QUARTER 1937	SECOND QUARTER 1937	THIRD QUARTER 1937	FOURTH QUARTER 1937	FIRST QUARTER 1938	SECOND QUARTER 1938	SALES (add 000)	PERCENT CHANGE FROM 1935	SALES (add 000)	PERCENT CHANGE FROM FIRST HALF 1937
UNITED STATES	685	6	$20,384	11	$5,307	$6,714	$7,474	$6,494	$4,979	$6,289	$25,989	+27.5	$11,268	- 6.3
NEW ENGLAND	60	8	2,085	11	521	687	744	573	491	621	2,627	+29.7	1,112	- 7.9
Connecticut	14	7	499	9	135	178	207	166	130	156	706	+41.5	286	- 8.6
Massachusetts	31	8	1,194	14	286	374	386	363	268	347	1,411	+18.2	615	- 7.1
Rhode Island	8	12	185	12	45	62	62	52	41	52	221	+19.5	93	-13.1
MIDDLE ATLANTIC	144	6	5,096	13	1,210	1,570	1,711	1,509	1,171	1,527	6,000	+17.7	2,698	- 3.0
New Jersey	29	7	982	12	237	297	327	293	224	292	1,154	+17.5	516	- 3.4
New York	64	6	2,716	13	627	837	876	762	620	830	3,102	+14.2	1,450	- 0.4
Pennsylvania	51	7	1,398	10	346	436	508	454	327	397	1,744	+24.7	724	- 7.4
EAST NORTH CENTRAL	161	7	3,977	11	1,069	1,342	1,424	1,249	932	1,174	5,084	+27.8	2,106	-12.7
Illinois	44	8	956	11	261	312	329	315	241	292	1,213	+27.1	533	- 8.7
Indiana	26	8	589	12	156	196	211	185	139	177	748	+27.0	316	-10.2
Michigan	29	7	760	13	205	268	269	243	172	232	985	+29.6	404	-14.6
Ohio	41	5	1,196	10	338	409	447	369	271	346	1,597	+30.2	617	-16.7
Wisconsin	21	6	476	11	115	157	168	139	109	127	579	+21.6	246	- 9.6
WEST NORTH CENTRAL	136	8	2,912	12	762	984	1,197	959	729	953	3,902	+34.0	1,682	- 3.7
Iowa	31	8	534	12	130	166	199	174	133	166	691	+29.4	299	- 0.3
Kansas	17	6	350	15	139	169	212	153	133	165	691	+24.5	298	- 8.6
Minnesota	28	8	571	13	132	167	300	186	121	181	807	+41.3	302	- 5.3
Missouri	33	9	770	14	236	276	316	269	223	284	1,099	+41.6	507	1.0
Nebraska	15	7	302	9	82	101	107	109	74	98	399	+32.1	172	- 6.0
North Dakota	7	7	125	13	34	47	64	48	33	45	193	+54.4	78	- 8.7
SOUTH ATLANTIC	44	5	1,382	8	391	488	534	482	378	450	1,895	+37.1	828	- 5.8
Maryland	7	6	216	9	63	72	81	74	55	72	290	+34.3	127	- 5.9
North Carolina	7	7	279	13	64	90	94	88	57	76	330	+18.5	133	-13.6
South Carolina	5	7	116	9	28	42	39	28	25	34	137	+18.1	59	-15.7
Virginia	6	6	336	11	93	126	145	139	104	120	503	+48.8	224	+ 2.3
West Virginia	6	7	121	12	55	69	83	69	47	58	276	+52.8	105	-13.3
EAST SOUTH CENTRAL	17	5	419	6	126	142	147	139	109	122	554	+32.2	231	-13.8
WEST SOUTH CENTRAL	28	3	1,361	8	354	423	490	413	337	391	1,680	+23.4	728	- 5.3
Oklahoma	8	3	437	13	109	129	156	122	93	105	516	+18.1	198	-16.8
Texas	19	3	902	8	239	285	326	281	234	279	1,131	+25.4	513	- 2.1
MOUNTAIN	17	4	625	10	143	190	216	173	139	174	722	+15.5	313	- 6.0
PACIFIC	78	7	2,586	13	731	888	1,011	895	693	877	3,345	+36.3	1,570	- 3.0
California	69	8	2,365	14	675	808	919	832	634	809	3,234	+36.7	1,443	- 2.7
Cities of more than 500,000 Population														
Buffalo	7	13	427	27	148	195	212	181	149	207	737	+21.3	356	+ 3.5
Chicago	11	6	338	9	88	114	116	117	87	98	435	+28.7	185	- 8.4
Detroit	8	7	321	16	83	102	101	104	76	94	390	+21.5	170	- 8.1
Los Angeles	14	7	393	12	104	114	131	121	101	128	470	+19.6	229	+ 5.0
New York	33	7	874	11	195	241	261	234	194	269	951	+ 8.8	463	+ 1.5
San Francisco	5	11	556	25	177	213	230	215	149	183	840	+31.1	332	-14.9

* *States and cities with less than five stores reporting or with a sample of less than ten percent of 1935 sales are not shown separately.*

Data for such states are included in the totals of their respective geographic divisions.

CENSUS SURVEY OF BUSINESS: 1937-38 — RETAIL DISTRIBUTION

AUTOMOTIVE ACCESSORY, TIRE AND BATTERY DEALERS (except chains)

TABLE 2.--PAY ROLL, BY QUARTERS FOR 1938(FIRST HALF)AND 1937

FOR IDENTICAL STORES, BY GEOGRAPHIC DIVISIONS, STATES AND PRINCIPAL CITIES.

DIVISION, STATE AND CITY*	NUMBER OF STORES INCLUDED IN 1937-38 SURVEY			PAYROLL BY QUARTERS, 1937-38 (see note)						YEAR 1937		FIRST HALF 1938	
	TOTAL	REPORTING PAY ROLL	REPORTING NO PAY ROLL	FIRST QUARTER 1937	SECOND QUARTER 1937	THIRD QUARTER 1937	FOURTH QUARTER 1937	FIRST QUARTER 1938	SECOND QUARTER 1938	PAY ROLL (see note)	PERCENT CHANGE FROM 1935	PAY ROLL (see note)	PERCENT CHANGE FROM FIRST HALF 1937
UNITED STATES	685	606	79	$836,944	$892,252	$931,338	$1,032,503	$850,326	$898,660	$3,693,037	+23.7	$1,749,186	+ 1.2
NEW ENGLAND	60	51	9	83,472	81,733	86,171	106,817	78,647	82,166	356,593	+27.2	160,813	- 2.1
Connecticut	14	12	2	21,508	22,451	23,884	25,665	20,947	21,376	92,928	+21.4	42,323	- 3.7
Massachusetts	31	28	3	44,805	45,770	48,643	66,670	45,396	49,019	206,088	+26.3	94,415	+ 4.2
Rhode Island	8	7	1	12,644	8,849	10,361	10,139	8,649	8,183	48,993	+50.4	17,038	-34.3
MIDDLE ATLANTIC	144	120	24	818,578	820,885	834,946	864,649	820,359	828,536	938,458	+14.6	445,895	+ 3.0
New Jersey	29	26	3	38,540	41,397	42,376	45,380	38,363	39,818	167,665	+ 9.0	77,875	- 2.6
New York	64	51	13	130,110	133,856	142,250	164,078	132,874	136,267	570,888	+17.6	271,141	+ 2.7
Pennsylvania	51	43	8	43,928	45,032	50,320	55,227	49,123	47,757	194,507	+13.1	96,879	+ 8.9
EAST NORTH CENTRAL	161	141	20	176,999	193,418	200,321	206,334	173,718	181,465	776,062	+24.9	355,197	- 3.9
Illinois	44	39	5	34,668	37,103	37,538	38,565	35,691	36,589	147,656	+15.3	72,280	- 0.7
Indiana	26	23	4	25,048	27,165	29,200	30,983	26,970	28,161	113,396	+27.9	55,131	+ 6.0
Michigan	29	26	3	39,329	41,608	41,927	45,580	33,992	38,443	167,444	+14.7	72,435	- 9.4
Ohio	41	37	4	59,308	65,402	67,460	63,866	55,084	55,963	255,436	+26.1	111,047	-11.0
Wisconsin	21	21	--	19,646	21,138	24,216	28,130	21,975	22,189	93,130	+28.7	44,104	+ 8.1
WEST NORTH CENTRAL	136	122	14	96,548	107,376	110,279	114,877	99,769	110,385	429,090	+29.5	210,154	+ 3.1
Iowa	31	27	4	17,864	18,101	18,813	20,156	18,449	19,389	74,936	+28.4	37,838	+ 5.2
Kansas	17	16	1	16,539	19,889	20,223	21,252	17,236	19,040	77,843	+23.4	36,276	- 0.3
Minnesota	28	24	4	14,780	16,157	16,951	17,893	15,115	15,720	65,721	+20.1	30,833	- 0.1
Missouri	33	31	2	33,762	37,187	39,348	40,837	35,508	41,069	152,034	+33.1	76,577	+ 6.4
Nebraska	15	14	1	9,653	10,468	10,315	10,365	9,572	10,117	40,795	+41.6	19,689	- 3.1
North Dakota	7	6	1	3,262	3,725	4,029	3,597	3,590	4,405	14,613	+25.1	7,685	+10.0
SOUTH ATLANTIC	44	40	4	58,907	62,260	64,876	90,847	60,501	73,443	275,990	+24.7	133,944	+11.4
Maryland	7	6	1	7,633	8,414	9,555	11,131	7,971	9,798	36,733	+28.2	15,769	- 1.8
North Carolina	9	7	--	10,589	12,157	12,823	17,411	10,631	11,622	52,320	+10.7	22,253	- 1.9
South Carolina	5	4	1	5,618	6,880	5,979	8,218	4,979	5,131	23,649	+14.0	10,110	+11.6
West Virginia	6	5	1	12,071	12,635	13,169	17,345	12,894	13,931	55,230	+34.0	25,825	+ 4.6
EAST SOUTH CENTRAL	17	17	--	17,036	19,177	18,914	20,750	16,151	16,752	75,877	+18.1	32,903	- 9.1
WEST SOUTH CENTRAL	28	27	1	52,901	59,136	59,094	62,766	55,041	57,000	233,977	+33.1	112,041	- 0.1
Oklahoma	8	8	--	21,362	23,448	23,892	23,714	20,728	19,614	92,416	+39.3	40,342	-10.0
Texas	19	18	1	30,990	35,032	34,445	38,349	33,566	36,639	138,786	+15.6	70,805	+ 6.4
MOUNTAIN	17	15	2	27,066	29,178	30,830	35,605	26,853	27,457	122,079	+34.3	54,310	- 3.4
PACIFIC	78	73	5	113,257	120,689	126,507	130,468	119,473	124,436	490,921	+36.0	243,909	+ 4.3
California	62	56	3	102,913	110,142	115,580	120,678	110,038	114,557	449,313	+34.5	224,595	+ 5.4
Cities of more than 500,000 Population													
Buffalo	7	5	2	28,968	30,199	33,393	33,507	29,867	31,183	126,067	+33.8	60,990	+ 3.1
Chicago	11	10	1	17,094	19,063	19,887	19,433	17,118	18,185	74,677	+30.1	35,235	- 2.6
Detroit	8	8	--	23,561	24,602	24,476	23,926	20,338	22,592	97,597	+ 6.8	42,930	- 9.0
Los Angeles	14	14	--	16,150	17,476	20,182	21,660	19,561	20,321	75,470	+ 5.0	39,882	+18.6
New York	33	27	6	39,791	40,247	39,152	41,419	38,680	43,807	160,609	+45.5	82,487	+ 3.1
San Francisco	5	5	--	32,997	33,111	34,761	34,068	30,794	31,891	134,937	+44.8	68,676	- 2.2

* States and cities with less than five stores reporting or with a sample of less than eight percent of 1935 sales are not shown separately. Pay roll not shown for Virginia because of inadequate sample. Data for states omitted are included in the totals of their respective geographic divisions.

Note: Pay roll does not include compensation for services of proprietors of unincorporated businesses, and cannot be compared with sales without adjustment for proprietors' services.

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38

Wholesale Distribution

BARBER AND BEAUTY PARLOR SUPPLY HOUSES

Dollar sales of 91 wholesalers of barber and beauty parlor supply houses -- identical establishments accounting for 28 percent of the total sales of all houses specializing in this business during 1935, the latest year covered by a regular business census -- increased 17.0 percent in the second quarter over the first quarter of 1938, but were 17.7 percent short of the total for the same period of 1937. Considering 1937 as a whole, their sales were 4.6 percent above 1936 and 19.1 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Barber and beauty parlor supply houses
Number of establishments included	91
Percent increase (+) or decrease (-) in sales	
1st Qr. to 2nd Qr. 1937	+ 22.4
2nd Qr. to 3rd Qr. 1937	- 23.7
3rd Qr. to 4th Qr. 1937	+ 9.9
4th Qr. 1937 to 1st Qr. 1938	- 16.0
1st Qr. 1938 to 2nd Qr. 1938	+ 17.0
1st Qr. 1938 vs. 1st Qr. 1937	- 13.9
2nd Qr. 1938 vs. 2nd Qr. 1937	- 17.7

1937 Compared with 1935

Substantial increases are noted in sales, pay roll, and stocks for 1937 as compared with 1935. Dollar sales of the 91 establishments were up 19.1 percent as compared with a 20.1 percent rise in pay roll, and 23.2 percent increase in stocks on hand at the close of the year.

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
91 Barber and beauty parlor supply houses	19.1	20.1	23.2

Pay Roll Increases

A significant trend is noted when pay roll (including saleries of executives and officers) is compared with sales. In 1935, pay roll of the 91 wholesalers amounted to $18.70 for each hundred dollars of sales. It rose to $18.80 in 1937; and then to $20.00 per hundred dollars for the first half of 1938.

	Pay roll per hundred dollars of sales		
	1938 (first half)	1937	1935
91 Barber and beauty parlor supply houses	$20.00	$18.80	$18.70

These and other facts pertaining to sales, pay roll and stocks of the esteblishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 91 wholesalers that submitted returns for the Survey prior to the closing date for this preliminary release. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Houses which came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this yeer were omitted. As they account for a small portion of the wholesale barber and beauty supply business, those with sales for the year 1935 of less than $25,000 were also omitted.

28% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contected submitted returns. The number is further limited by the omission of those which changed their generel location or the nature of their operetions since 1935. In order to provide reliable trend informetion, establishments included in this release are limited to those operating as wholesale barber and beauty supply houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that 91 wholesalers represented 14 percent of the number and accounted for 28 percent of the total business for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of esteblishments end of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

BARBER AND BEAUTY PARLOR SUPPLY HOUSES

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net * Sales Year 1937 (add 000)	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr 1937 To 2nd Qr. 1938
	Establishments %	Net * Sales %			1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	14	28	91	$12,751	$3,049	$3,731	$2,845	$3,126	$2,626	$3,072	-13.9	-17.7
Middle Atlantic	16	41	28	5,713	1,399	1,712	1,220	1,381	1,169	1,405	-16.4	-17.9
East North Central	14	25	19	1,925	445	583	401	496	363	436	-18.4	-25.2
West North Central	11	10	6	469	108	146	107	108	98	123	- 9.3	-15.8
South Atlantic	8	15	6	645	138	198	149	160	120	178	-13.0	-10.1
West South Central	12	22	8	778	177	211	163	207	185	193	+ 4.5	- 8.5
Pacific	33	43	18	2,142	530	566	535	511	458	461	-13.5	-18.6
Other Divisions	7	18	6	1,080	252	315	250	263	233	276	- 7.5	-12.4

\+ INCREASE – DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

BARBER AND BEAUTY PARLOR SUPPLY HOUSES

TABLE 2.-- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	14	28	91	$12,751	$12,190	$10,704	$2,399	$1,998	$2,419	$2,218	$1,963	19.1	20.1	23.2
Middle Atlantic	16	41	28	5,712	5,562	4,797	1,047	831	877	796	724	19.1	26.0	21.1
East North Central	14	25	19	1,925	1,813	1,658	336	285	455	397	344	16.1	17.9	32.3
West North Central	11	10	6	469	455	445	91	85	139	128	111	5.4	7.1	25.2
South Atlantic	8	15	6	645	592	469	105	79	147	125	120	37.5	34.2	22.5
West South Central	12	22	8	778	707	587	139	114	188	169	150	32.5	21.9	25.3
Pacific	33	43	18	2,142	2,028	1,832	469	420	471	464	403	16.9	11.7	16.9
Other Divisions	7	18	6	1,080	1,033	916	211	184	142	139	111	17.9	14.7	27.9

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

BEER AND OTHER FERMENTED MALT LIQUORS

Dollar sales of 464 wholesalers of beer and other fermented malt liquors -- identical establishments accounting for 21 percent of the sales for all houses specializing in this business during 1935, the latest year covered by a regular business census -- increased 37.0 percent in the second quarter over the first quarter of 1938, but were 7.6 percent under sales for the second quarter of 1937. Their total business for the year 1937 was 13.2 percent above 1936 and 53.2 percent higher than for the year 1935.

In addition to the wholesalers, 67 manufacturers' sales branches are included in this Survey. Dollar sales of these branches in the second quarter of this year were 40.1 percent above the first quarter but 9.6 percent under the total for the second quarter of 1937. Considering 1937 as a whole, their business increased 12.7 percent over 1936 and 44.7 percent as compared with 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage change in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	464	67
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+49.1	+62.9
2nd Qr. to 3rd Qr. 1937	+19.1	+13.3
3rd Qr. to 4th Qr. 1937	-29.1	-33.5
4th Qr. 1937 to 1st Qr. 1938	-20.2	-14.3
1st Qr. 1938 to 2nd Qr. 1938	+37.0	+40.1
1st Qr. 1938 vs. 1st Qr. 1937	+ 0.5	+ 5.1
2nd Qr. 1938 vs. 2nd Qr. 1937	- 7.6	- 9.6

1937 Compared with 1935

Substantial gains are noted in sales, pay roll and stocks for 1937 compared with 1935. Dollar sales of the 464 wholesalers were up 53.2 percent as compared with a 57.0 percent increase in pay roll, while stocks on hand at the end of the year rose 78.0 percent. For the 67 manufacturers' sales branches, sales increased 44.7 percent, pay roll rose 17.7 percent, and stocks were up 33.9 percent.

	Percentage increases, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
464 Service and limited-function wholesalers	53.2	57.0	78.0
67 Manufacturers' sales branches	44.7	17.7	33.9

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey, are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 464 wholesalers and 67 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale beer and other fermented malt liquors business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers and branches that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of this business, those with sales for the year 1935 of less than $25,000 were also omitted.

21% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale beer and other fermented malt liquors houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 464 wholesalers represented 12 percent of the number and accounted for 21 percent of the business for all wholesalers in 1935, and the 67 manufacturers' sales branches represented 26 percent of the number and accounted for 60 percent of the total sales for the classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

- 0 -

This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

BEER AND OTHER FERMENTED MALT LIQUORS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET * SALES YEAR 1937	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR 1938	2ND QR 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	NET * SALES %		(add 000)	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	12	21	464	$88,483	$16,017	$23,874	$28,425	$20,167	$16,091	$22,049	+ 0.5	- 7.6
New England	19	38	33	10,789	1,929	2,774	3,653	2,373	1,938	2,767	+ 0.5	- 0.3
Middle Atlantic	10	16	124	17,383	3,123	4,649	5,655	3,955	3,130	4,412	+ 0.2	- 5.1
East North Central	14	22	121	26,897	4,865	7,536	8,692	6,003	4,763	6,281	- 2.1	-14.4
West North Central	13	19	71	9,825	1,691	2,653	3,279	2,222	1,811	2,450	+ 8.4	- 7.7
South Atlantic	10	13	26	3,669	753	1,020	1,068	808	711	948	- 5.6	- 7.1
East South Central	7	17	9	1,777	320	483	573	401	303	439	+10.3	- 9.1
West South Central	6	15	14	2,757	545	767	846	599	566	696	+ 3.9	- 9.3
Mountain	9	8	12	893	143	250	318	182	139	218	- 2.8	-12.8
Pacific	12	32	44	14,553	2,668	3,942	4,319	3,624	2,680	3,838	+ 0.4	- 2.6
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	26	60	67	39,038	10,355	16,871	19,111	12,701	10,887	15,255	+ 5.1	- 9.6
Middle Atlantic	1/	1/	16	14,161	2,471	3,953	4,824	2,913	2,633	3,654	+ 6.6	- 7.6
East North Central	--	--	10	18,883	3,232	5,101	6,056	4,494	3,477	4,655	+ 7.6	- 8.7
West North Central	--	--	18	7,863	1,424	2,582	2,633	1,222	1,408	1,915	- 1.3	-16.1
South Atlantic	--	--	4	2,826	589	817	826	584	602	767	+ 2.2	- 6.1
Pacific	--	--	12	9,867	1,852	3,135	2,928	1,952	1,835	2,793	- 0.9	-10.9
Other divisions	--	--	7	3,438	788	1,283	1,834	1,236	932	1,471	+18.7	- 7.1

\+ INCREASE — DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
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WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

BEER AND OTHER FERMENTED MALT LIQUORS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	12	21	464	$88,483	$78,142	$57,745	$6,177	$3,935	$3,849	$3,203	$2,162	53.2	57.0	78.0
New England	19	32	53	10,729	9,540	7,365	743	507	300	254	198	45.7	46.5	51.5
Middle Atlantic	10	16	124	17,333	15,244	10,762	1,097	699	409	394	203	61.5	56.9	101.5
East North Central	14	22	131	26,897	22,720	16,651	1,826	1,146	829	720	443	61.5	59.3	87.1
West North Central	15	19	71	9,825	8,954	5,605	729	445	376	344	251	44.4	63.8	50.6
South Atlantic	10	15	26	3,669	3,501	2,632	246	178	116	114	74	39.4	38.2	56.8
East South Central	7	17	9	1,777	1,654	1,091	182	101	60	51	42	62.9	80.2	42.9
West South Central	6	15	14	2,757	2,490	2,067	163	115	191	189	145	33.4	41.7	31.7
Mountain	9	8	17	893	754	662	53	46	37	34	31	34.9	15.2	19.4
Pacific	12	32	44	14,553	13,135	9,710	1,136	696	1,529	1,113	775	49.9	63.0	97.3
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	26	60	67	59,036	52,396	40,767	2,986	2,537	533	551	398	44.7	17.7	33.9
Middle Atlantic	1/	1/	16	14,161	11,863	9,922	769	601	61	54	35	42.7	28.0	121.4
East North Central	--	--	10	18,683	15,680	11,080	897	737	109	129	69	70.4	21.7	58.0
West North Central	--	--	18	7,863	7,992	6,103	361	329	80	84	68	28.8	9.7	17.6
South Atlantic	--	--	4	2,886	2,470	2,179	158	136	26	22	13	29.7	11.8	100.0
Pacific	--	--	12	9,867	9,832	8,332	574	539	205	243	200	18.4	6.5	2.5
Other divisions	--	--	7	5,436	4,559	3,171	233	195	32	19	13	71.5	19.5	146.2

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

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SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report (4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

CLOTHING AND FURNISHINGS

Dollar sales of 627 wholesalers of clothing and furnishings -- identical establishments which accounted for 23 percent of the total business of all service and limited-function wholesalers in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were slightly under (0.2%) sales for the first quarter, and were 15.9 percent less than sales for the corresponding period of 1937. Considering 1937 as a whole, sales of the 627 wholesalers were 1.8 percent above 1936 and 19.3 percent higher than sales for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Of the 627 clothing and furnishing wholesalers included in this Survey, 72 are classified as full-line houses, and 171 specialize in men's and boys', 151 in women's and children's, 37 are engaged primarily in the fur business (furs and fur clothing), 38 specialize in hosiery, 75 in millinery and millinery supplies, and 83 in the shoe business. Sales of all classes of houses were off in the first two quarters of this year as compared with similar periods in 1937. Full-line houses and those specializing in men's and boys', hosiery and shoes, however, show increases in the second quarter over the first quarter of this year. All classes of wholesalers show substantial gains in business when 1937 is compared with 1936.

In addition to the 627 wholesalers, 110 manufacturers' sales branches are included in this Survey. Sales of these branches show the same general trend as for service and limited-function wholesalers, but with a tendency to reflect changes in an earlier period.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers selling principally---								Manufacturers' Sales Branches
	Total	Clothing, furnishings (full-line)	Men's and boys'	Women's and children's	Furs and fur clothing	Hosiery	Millinery	Shoes	
Number of establishments included	627	72	171	151	37	38	75	83	110
Percent increase (+) or decrease (-) in sales									
1st Qr. to 2nd Qr. 1937	- 0.6	+24.5	+12.1	-11.7	+ 6.7	+ 3.3	-11.1	- 1.2	-12.7
2nd Qr. to 3rd Qr. 1937	+16.9	+21.6	+13.9	+12.3	+35.8	+ 0.2	+11.1	+28.1	+25.4
3rd Qr. to 4th Qr. 1937	-13.5	+ 6.6	- 1.1	- 9.9	-36.5	+11.6	-21.3	-35.2	-17.1
4th Qr. 1937 to 1st Qr. 1938	-16.8	-50.7	-40.7	- 6.1	-27.8	-20.5	+23.5	+ 7.9	-11.9
1st Qr. 1938 to 2nd Qr. 1938	- 0.2	+39.1	+22.7	-12.0	-43.4	+10.7	- 9.6	+ 0.3	- 7.6
1st Qr. 1938 vs. 1st Qr. 1937	-16.3	-20.4	-25.2	-16.2	-33.5	- 8.2	- 4.0	-11.6	-20.0
2nd Qr. 1938 vs. 2nd Qr. 1937	-15.9	-11.1	-18.1	-16.4	-64.7	- 1.6	- 2.4	-10.2	-15.4

1937 Compared with 1935

Increases are noted in sales, pay roll and stocks for 1937 as compared to 1935. Dollar sales of the 627 wholesalers were up 19.3 percent as compared with an 18.8 percent rise in pay roll and a 25.7 percent increase in stocks on hand at the close of the year. The 110 manufacturers' sales branches show an 18.1 percent increase in sales, 17.9 percent in pay roll and a 77.2 percent rise in stocks.

Percentage increase, 1937 over 1935, in sales, pay roll and stocks, are given below:

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (627 establishments)	19.3	18.8	25.7
Clothing and furnishings (full-line) (72 estab.)	9.2	8.0	21.0
Men's and boys' (171 establishments)	14.2	21.6	35.0
Women's and children's (151 establishments)	14.6	21.0	30.4
Furs, dressed, and fur clothing (37 establishments)	32.9	23.9	57.9
Hosiery (38 establishments)	18.4	27.0	23.2
Millinery and millinery supplies (75 establishments)	36.9	30.1	19.5
Shoes and other footwear (83 establishments)	27.2	9.2	13.2
Manufacturers' sales branches (110 establishments)	18.1	17.9	77.2

These and other facts pertaining to the sales, pay roll and stocks of the 627 wholesalers and 110 manufacturers' sales branches are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by establishments which submitted returns for the current Survey prior to the closing date for this preliminary release. This report is not intsnded to present a complete picture of the wholesale clothing and furnishing business. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Houses or branches which came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year are omitted. As they account for only a small portion of the wholesale clothing and furnishing business, those with sales for the year 1935 of less than $25,000 are also omitted.

23% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale clothing and furnishing houses or branches for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 627 wholesalers (service and limited-function) represented 16 percent of the number and accounted for 23 percent of the total sales of all clothing and furnishing wholesalers in 1935. Likewise, the 110 branches accounted for 32 percent of the number and 48 percent of the business for this classification. For convenience, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nationwide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

CLOTHING AND FURNISHINGS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	16	23	627	$197,582	$43,659	$42,394	$49,568	$42,901	$36,701	$35,642	-16.3	-15.9
Clothing & furnishings (full-line)	13	24	72	17,386	3,836	4,028	4,899	5,253	2,576	3,582	-32.4	-11.1
Mac's & boy's	17	23	171	30,512	6,546	7,340	8,360	8,264	4,899	6,011	-25.2	-18.1
Womec's & childrec'e	14	20	151	52,755	14,006	12,364	13,882	12,503	11,742	10,331	-16.2	-16.4
Furs & fur clothing	13	29	37	12,641	2,849	3,040	4,129	2,623	1,895	1,073	-33.5	-64.7
Hosiery	19	39	36	16,589	3,927	4,058	4,067	4,537	3,605	3,992	- 8.2	- 1.6
Millinery & supplies	21	24	75	14,038	3,842	3,415	3,794	2,987	3,688	3,334	- 4.0	- 2.4
Shoes & other footwear	18	22	83	53,601	8,251	8,149	10,437	6,764	7,296	7,319	-11.6	-10.2
Clothing & furnishings (full-line)												
Middle Atlantic	12	28	34	10,077	1,789	2,295	2,783	3,210	1,475	2,097	-17.7	- 8.6
East North Central	14	22	15	3,048	544	737	890	877	456	724	-16.2	- 1.8
South Atlantic	9	12	5	712	153	144	204	211	123	137	-19.6	- 4.9
East South Central	13	31	4	1,264	282	305	376	302	168	163	-40.2	-46.6
Pacific	19	24	4	361	88	73	109	91	55	56	-37.5	- 9.6
Other Divisions	15	17	10	1,924	381	474	537	532	301	395	-21.0	-16.7
Mac's & boy's												
New England	25	42	21	3,912	759	882	1,145	1,126	492	750	-35.2	-15.0
Middle Atlantic	15	17	77	13,599	3,133	3,464	3,508	4,804	2,561	2,802	-18.4	-19.1
East North Central	16	21	29	3,375	815	906	980	674	586	671	-28.1	-25.9
West North Central	15	22	9	3,131	674	822	900	735	543	735	-19.4	-10.6
South Atlantic	14	20	8	894	161	167	199	167	164	164	+ 1.9	- 1.8
East South Central	26	33	5	755	147	186	246	176	109	125	-25.9	-32.8
Pacific	21	40	15	2,937	619	694	891	745	457	596	-26.2	-12.9
Other Divisions	26	51	7	1,109	250	229	391	239	167	168	-25.2	-26.6
Womec's & childrec'e												
New England	14	19	8	1,414	364	410	321	319	354	428	- 2.7	+ 4.4
Middle Atlantic	13	17	90	25,388	8,966	6,565	9,242	8,609	7,640	7,089	-14.8	-17.9
East North Central	15	27	16	5,826	1,615	1,417	1,562	1,234	1,204	1,023	-25.4	-27.8
West North Central	18	31	10	2,387	1,166	632	1,009	720	883	612	-24.3	- 3.2
Pacific	19	33	19	4,987	1,474	999	1,301	1,213	1,277	955	-13.4	- 4.4
Other Divisions	11	16	8	1,619	423	341	447	408	384	284	- 9.2	-16.7
Furs & fur clothing												
Middle Atlantic	11	28	23	9,276	1,772	2,260	3,239	2,005	1,257	604	-29.1	-73.3
Other Divisions	22	37	14	3,365	1,077	780	890	618	638	469	-40.8	-39.9
Hosiery												
Middle Atlantic	21	45	24	13,250	3,167	3,262	3,299	3,522	2,894	3,173	- 8.6	- 2.7
Other Divisions	21	31	12	3,339	760	796	768	905	711	819	- 6.4	+ 2.9
Millinery & supplies												
Middle Atlantic	18	21	33	8,304	2,275	2,009	2,252	1,768	2,197	2,009	- 3.4	0.0
East North Central	28	37	16	3,131	803	804	808	716	789	732	+ 1.7	-10.4
West North Central	26	43	9	1,268	364	279	360	265	350	272	- 3.8	- 2.5
Pacific	22	27	10	753	238	168	209	138	206	181	-13.9	+ 7.7
Other Divisions	19	11	7	582	162	155	165	100	147	152	- 9.5	- 1.9
Shoes & other footwear												
New England	11	15	12	3,824	871	946	1,190	817	701	789	-19.5	-16.6
Middle Atlantic	16	24	28	12,572	2,897	3,163	3,974	2,538	2,663	2,762	- 8.1	-12.7
East North Central	22	30	13	2,936	604	666	837	829	641	676	+ 6.1	+ 1.5
West North Central	27	31	10	2,818	741	684	902	491	811	735	+ 9.4	+ 7.5
South Atlantic	29	53	10	6,866	1,946	1,594	2,171	1,155	1,533	1,300	-21.2	-18.4
East South Central	23	32	6	1,760	457	416	518	368	325	359	-30.4	-13.7
Pacific	17	28	4	2,825	725	680	861	569	682	698	-14.2	+ 2.6
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	32	42	110	161,492	41,668	36,394	45,622	37,808	33,317	30,782	-20.0	-15.4
Mac's & boy's	26	33	34	42,514	9,951	10,361	12,671	9,531	8,602	8,273	- 9.2	-15.7
Womec's & children's	18	20	19	11,461	3,046	2,858	3,116	2,441	2,731	2,108	-10.3	-26.2
Hosiery	43	37	6	4,451	988	1,094	1,096	1,273	1,046	987	+ 5.9	- 9.8
Shoes & other footwear	78	79	45	101,307	27,753	22,081	30,508	20,945	20,596	18,545	-25.8	-14.5
All other	19	13	6	1,709	330	460	641	478	342	472	+ 3.6	+ 2.6
Clothing & furnishings												
New England	36	60	7	6,309	1,977	1,436	1,962	1,034	1,181	1,119	-37.1	-28.1
Middle Atlantic	17	26	28	39,857	9,411	9,799	9,531	11,116	7,409	7,694	-21.3	-21.5
East North Central	36	42	18	17,660	3,812	5,189	4,261	5,398	3,291	3,616	-11.0	-13.7
West North Central	57	78	13	71,860	20,423	15,036	22,820	13,581	16,165	13,172	-20.9	-12.4
Pacific	29	51	15	9,153	2,035	3,052	3,562	3,508	2,761	2,715	+35.7	-11.0
Other Divisions	32	59	13	12,449	3,007	2,879	3,486	3,077	2,410	2,472	-19.9	-14.1

+ INCREASE — DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CLOTHING AND FURNISHINGS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTAB. INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)			STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 = 1937		
	ESTAB-LISH-MENTS %	NET* SALES %		1937	1936	1935	1937	1935	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS															
UNITED STATES	16	23	629	$177,522	$174,368	$140,863	$13,814	$11,626	$21,159	$19,581	$16,889		19.3	16.8	25.7
Clothing & Furn'gs. (full-line)	13	24	72	7,586	17,765	15,914	1,547	1,432	2,953	2,864	2,440		9.2	8.0	21.0
Men's & boy's	17	23	171	30,512	30,628	26,725	2,947	2,424	5,377	5,117	4,627		14.2	21.6	36.0
Women's & children's	14	20	151	52,755	51,723	45,038	3,818	3,155	5,530	5,243	3,708		14.6	21.0	30.4
Furs & fur clothing	13	29	37	12,641	13,385	9,511	725	588	1,050	1,156	665		32.9	23.9	57.9
Hosiery	19	39	36	16,589	15,782	14,011	866	682	1,734	1,564	1,407		18.4	27.0	23.2
Millinery & supplies	21	24	75	14,038	12,871	10,253	1,582	1,216	944	991	790		36.9	30.1	19.5
Shoes & other footwear	18	28	83	33,401	30,238	26,411	2,329	2,125	4,971	4,646	4,392		27.2	9.8	13.2
Clothing & furn'gs. (full-line)															
Middle Atlantic	12	28	34	10,077	10,367	9,285	930	800	1,734	1,678	1,564		8.6	16.3	9.5
East North Central	14	22	15	3,048	3,366	3,067	294	351	412	378	288		-0.6	-16.2	43.1
South Atlantic	9	12	5	712	652	628	46	36	91	86	76		34.8	27.8	19.7
East South Central	13	31	4	1,254	1,470	1,140	98	101	199	209	187		10.9	-3.0	6.4
Pacific	19	24	4	361	360	340	32	23	141	135	95		3.7	39.1	48.9
Other divisions	15	17	10	1,924	1,560	1,549	147	121	375	368	220		24.2	21.5	70.9
Men's & boy's															
New England	23	48	21	3,912	4,119	3,689	435	394	844	755	578		7.0	10.4	46.0
Middle Atlantic	15	17	77	14,399	15,938	12,152	1,086	816	2,530	2,150	1,896		18.5	33.7	33.4
East North Central	16	21	29	3,875	3,465	3,075	341	321	561	509	465		16.3	6.2	20.6
West North Central	25	9	9	3,131	3,175	2,790	586	416	594	524	362		12.2	40.9	41.1
South Atlantic	14	20	8	694	682	535	47	41	80	69	40		29.7	14.6	100.0
East South Central	26	33	5	755	828	606	58	58	185	191	123		24.6	11.5	50.4
Pacific	21	40	15	2,937	3,020	2,829	346	301	845	723	740		3.8	15.0	14.6
Other divisions	26	51	7	1,109	1,411	1,081	158	83	335	186	223		2.6	30.1	50.2
Women's & children's															
New England	14	19	8	1,414	1,392	1,314	79	78	76	81	83		7.6	1.3	8.4
Middle Atlantic	13	17	90	25,382	24,875	23,807	2,604	1,945	2,504	2,560	1,989		19.6	33.9	27.9
East North Central	15	27	16	5,826	6,410	6,293	455	582	317	305	248		-7.4	-17.6	31.0
West North Central	18	31	10	3,529	3,714	3,441	201	184	138	148	99		12.0	9.2	33.3
Pacific	19	33	19	4,987	4,919	4,529	371	323	398	361	286		10.1	14.9	41.1
Other divisions	11	16	8	1,619	1,463	1,163	108	73	103	80	44		39.2	47.9	134.1
Furs & fur clothing															
Middle Atlantic	11	28	23	9,276	10,172	7,200	567	472	640	761	393		28.8	24.4	62.8
Other divisions	22	37	14	3,365	3,193	2,311	158	115	410	395	272		45.6	22.1	50.7
Hosiery															
Middle Atlantic	21	45	24	13,350	12,925	11,510	667	497	1,375	1,246	1,124		16.0	37.0	22.3
Other divisions	21	31	14	3,239	2,857	2,501	199	185	359	318	283		29.5	2.1	26.9
Millinery & supplies															
Middle Atlantic	18	21	33	8,304	7,561	6,135	604	692	602	690	559		35.4	16.2	7.7
East North Central	28	37	16	3,151	2,839	2,243	526	297	328	195	140		69.4	77.1	60.7
West North Central	26	43	9	1,256	1,130	1,079	108	103	32	23	19		17.5	4.9	68.4
Pacific	22	27	10	753	747	724	73	69	30	49	46		4.0	7.4	8.7
Other divisions	19	11	7	582	574	472	71	56	35	31	26		23.3	26.8	34.6
Shoes & other footwear															
New England	11	15	12	3,824	3,976	3,389	320	303	634	632	627		16.3	6.0	1.1
Middle Atlantic	16	34	28	12,572	10,545	8,747	732	616	1,388	1,286	1,122		43.7	18.8	23.7
East North Central	22	30	13	2,926	3,368	3,263	297	265	507	398	348		4.0	12.0	30.7
South Atlantic	29	53	10	2,818	2,939	2,670	194	192	543	473	521		5.5	1.0	4.2
Pacific	23	32	10	6,866	7,009	6,841	354	307	1,045	980	1,016		33.8	0.6	7.4
Other divisions	23	32	6	1,760	1,532	1,340	92	73	350	290	297		41.9	26.0	17.8
Other divisions	17	28	4	2,883	2,845	2,098	190	147	548	490	457		34.7	29.3	40.5
MANUFACTURERS' SALES BRANCHES(with stocks)															
UNITED STATES	32	48	110	161,492	153,428	136,727	11,611	9,852	33,124	26,492	18,695		18.1	17.9	77.2
Men's & boy's	36	53	36	42,814	38,845	32,830	3,166	2,525	4,992	4,848	3,865		29.2	25.4	29.2
Women's & children's	18	30	19	11,461	10,922	9,464	1,201	950	821	903	740		21.1	26.4	10.9
Hosiery	43	37	6	4,451	4,411	4,394	181	232	347	398	248		-0.9	-22.0	41.6
Shoes & other footwear	78	79	43	101,357	97,917	88,151	6,936	5,995	26,889	20,357	13,658		15.0	15.7	97.0
All other	19	13	6	1,709	1,432	1,883	127	150	95	96	100		33.2	-15.3	5.0
Clothing & furnishings															
New England	36	60	7	6,309	5,986	5,732	385	338	482	383	389		10.1	13.9	18.2
Middle Atlantic	17	26	29	29,857	30,158	30,028	2,987	2,893	6,146	5,282	3,788		30.0	29.0	54.4
East North Central	35	42	18	17,660	17,028	14,068	1,811	1,562	2,150	1,992	1,664		25.6	15.9	29.2
West North Central	57	78	13	71,860	68,861	66,574	4,545	4,376	19,908	14,819	9,368		7.9	6.2	112.7
Pacific	52	57	31	13,327	12,700	10,744	926	844	1,744	1,717	1,565		5.5	9.8	11.2
Other divisions	52	59	13	12,449	11,539	8,434	987	535	2,694	2,379	1,778		47.6	64.5	51.5

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

CONFECTIONERY TRADE

Dollar sales of 241 confectionery wholesalers -- identical establishments accounting for 23 percent of the total sales of all houses specializing in this business during 1935, the latest year covered by a regular business census -- increased 4.8 percent in the second quarter over the first quarter of 1938, but, were 8.9 percent short of sales for the second quarter of 1937. Considering 1937 as a whole, their business increased 7.2 percent as compared with the total for 1936 and 22.2 percent over 1935.

In addition to the wholesalers, 19 manufacturers' sales branches are included in this Survey. Dollar sales of these branches in the second quarter of this year were 14.7 percent less than sales for the first quarter, and 2.7 percent below sales for the second quarter of 1937. Their total 1937 business, however, was 10.6 percent above 1936 and 20.5 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage change in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	241	19
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 7.2	-18.5
2nd Qr. to 3rd Qr. 1937	+ 1.0	+18.2
3rd Qr. to 4th Qr. 1937	+ 7.5	+ 3.9
4th Qr. 1937 to 1st Qr. 1938	-20.0	- 7.1
1st Qr. 1938 to 2nd Qr. 1938	+ 4.8	-14.7
1st Qr. 1938 vs. 1st Qr. 1937	- 6.9	- 7.0
2nd Qr. 1938 vs. 2nd Qr. 1937	- 8.9	- 2.7

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937, compared with 1935. Dollar sales of the 241 wholesalers were up 22.2 percent as compared with a 20.5 percent increase in pay roll and a 15.8 percent rise in stocks on hand at the close of the year. For the 19 manufacturers' sales branches, sales were up 20.5 percent; pay roll increased 6.2 percent, while stocks were up 27.1 percent.

	Percentage increases, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
241 Service and limited-function wholesalers	22.2	20.5	15.8
19 Manufacturers' sales branches	20.5	6.2	27.1

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 241 wholesalers and 19 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale confectionery business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale confectionery business, those with sales for the year 1935 of less than $25,000 were also omitted.

23% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale confectionery houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 241 wholesalers represented 12 percent of the number and accounted for 23 percent of the business for all wholesalers in 1935, and the 19 manufacturers' sales branches represented 23 percent of the number and accounted for 51 percent of the total sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business included retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CONFECTIONERY TRADE

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales Year 1937 (add 000)	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr 1937 To 2nd Qr. 1938
	Establishments %	Net * Sales %			1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	12	23	241	$31,162	$7,218	$7,735	$7,811	$8,398	$6,721	$7,043	- 6.9	- 8.9
New England	18	30	25	3,027	662	746	822	797	610	690	- 7.9	- 7.5
Middle Atlantic	14	26	85	11,124	2,626	2,742	2,767	2,989	2,321	2,452	-11.6	-10.6
East North Central	12	26	54	6,753	1,546	1,669	1,684	1,854	1,497	1,551	- 3.2	- 7.1
West North Central	7	9	10	750	167	194	182	207	162	167	- 3.0	-13.9
South Atlantic	12	21	35	4,104	999	1,029	995	1,081	915	894	- 8.4	-13.1
West South Central	7	15	11	1,988	487	479	484	538	510	494	+ 4.7	+ 3.1
Pacific	10	27	13	2,107	465	520	513	609	449	485	- 3.4	- 6.7
Other divisions	6	14	8	1,309	266	356	364	323	257	310	- 3.4	-12.9
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	23	51	19	22,929	6,066	4,944	5,845	6,074	5,640	4,811	- 7.0	- 2.7

\+ Increase - Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
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SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CONFECTIONERY TRADE

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	12	23	241	$31,162	$29,059	$25,497	$2,502	$2,076	$2,219	$2,201	$1,916	22.2	20.5	15.8
New England	18	30	25	3,027	2,607	2,694	232	209	205	186	178	12.4	11.0	15.2
Middle Atlantic	14	26	85	11,124	10,724	9,558	850	769	799	800	761	16.4	10.5	5.0
East North Central	12	26	54	6,753	6,234	5,310	467	406	452	432	348	27.2	15.0	29.9
West North Central	7	9	10	750	734	667	92	65	61	64	55	12.4	41.5	10.9
South Atlantic	12	21	35	4,104	3,848	3,502	398	346	290	294	255	17.2	15.0	13.7
West South Central	7	15	11	1,988	1,820	1,438	88	74	154	168	153	38.2	18.9	0.7
Pacific	10	27	13	2,107	1,866	1,415	254	140	148	148	107	48.9	81.4	38.3
Other divisions	6	14	8	1,309	1,226	913	121	67	110	109	59	43.4	80.6	86.4
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	23	51	19	22,929	20,729	19,023	671	632	684	593	538	20.5	6.2	27.1

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

* * Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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DEPARTMENT OF COMMERCE
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Preliminary report
(4 pages)

Census Survey of Business: 1937-38

Wholesale Distribution

DENTAL SUPPLY HOUSES

Dollar sales of 92 dental supply wholesalers -- identical establishments accounting for 52 percent of the total sales of all houses specializing in this business in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were moderately under (1.9%) sales for the first quarter, and were 18.7 percent below sales for the second quarter of 1937. However, their total business for the year 1937 was 3.1 percent above 1936 and 16.9 percent higher than for the year 1935.

In addition to the wholesalers, 32 manufacturers' sales branches are included in this Survey. Dollar sales of these branches decreased 2.6 percent in the second quarter compared with the first quarter of this year, and were 25.5 percent under sales for the second quarter of 1937. Their total 1937 sales, however, were 5.4 percent above 1936 and 23.5 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	92	32
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 9.6	+ 10.4
2nd Qr. to 3rd Qr. 1937	- 2.1	- 11.5
3rd Qr. to 4th Qr. 1937	- 4.9	+ 4.7
4th Qr. 1937 to 1st Qr. 1938	- 11.0	- 17.4
1st Qr. 1938 to 2nd Qr. 1938	- 1.9	- 2.6
1st Qr. 1938 vs. 1st Qr. 1937	- 9.2	- 15.5
2nd Qr. 1938 vs. 2nd Qr. 1937	- 18.7	- 25.5

1937 Compared with 1935

Increases are noted in sales and pay roll and stocks for 1937 compared with 1935. Dollar sales of the 92 wholesalers were up 16.9 percent as compared with a 19.4 percent increase in pay roll while stocks on hand at the end of the year rose 14.5 percent. For the 32 manufacturers' sales branches included, dollar sales were up 23.5 percent with a 13.8 percent increase in pay roll while stocks decreased 8.4 percent.

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
92 Service and limited-function wholesalers	16.9	19.4	14.5
32 Manufacturers' sales branches	23.5	13.8	- 8.4

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 92 supply houses and 32 Manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale dental supply business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and supply houses that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale dental supply business, those with sales for the year 1935 of less than $25,000 were also omitted.

52% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide relisble trend information, establishments included are limited to those operating as wholesale dental supply houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 92 wholesalers represented 36 percent of the number and accounted for 52 percent of the total business for this classification in 1935, and the 32 manufacturers' sales branches represented 84 percent of the total number and accounted for 87 percent of the business of all branches in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

DENTAL SUPPLY HOUSES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net * Sales Year 1937	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr. 1937 To 2nd Qr. 1938
	Establishments %	Net * Sales %		(add 000)	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	36	52	92	$14,046	$3,383	$3,675	$3,597	$3,421	$3,045	$2,986	- 9.2	-18.7
New England	42	67	8	1,501	378	405	371	347	311	322	-17.7	-20.5
Middle Atlantic	32	44	22	2,613	635	690	641	657	583	552	- 8.2	-18.8
East North Central	33	54	16	2,432	615	653	600	564	507	476	-17.6	-27.1
West North Central	44	58	12	2,114	503	556	547	508	473	469	- 6.0	-15.6
South Atlantic	38	52	6	814	190	198	218	218	159	172	-11.7	-13.1
West South Central	41	61	7	1,393	298	365	370	360	284	306	- 4.7	-16.2
Pacific	40	52	16	2,443	592	623	624	604	576	535	- 2.7	-14.1
Other divisions	26	35	5	736	152	195	226	163	152	154	0.0	-21.0
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	84	87	32	12,083	2,944	3,251	2,976	3,012	2,487	2,422	-15.5	-25.5
Middle Atlantic	1/	1/	5	6,357	1,571	1,725	1,439	1,622	1,315	1,319	-16.3	-23.5
East North Central	--	--	19	3,978	950	1,070	992	966	776	733	-18.3	-31.5
West North Central	--	--	3	1,748	423	456	445	424	396	370	- 6.4	-18.9
Other divisions	--	--	5									

\- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)*
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

DENTAL SUPPLY HOUSES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Estab-lish-ments Includ-ed In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Estab-lish-ments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	36	52	92	$14,046	$13,680	$12,017	$2,921	$2,446	$3,600	$3,365	$3,145	16.9	19.4	14.5
New England	42	67	8	1,501	1,431	1,443	380	326	409	421	409	4.0	16.6	0.0
Middle Atlantic	32	44	22	2,613	2,491	2,189	506	408	754	572	551	19.4	24.0	36.8
East North Central	33	54	16	2,432	2,358	1,980	475	402	580	561	509	22.8	18.2	13.9
West North Central	44	58	12	2,114	2,103	1,948	533	459	545	541	560	8.5	16.1	- 2.7
South Atlantic	36	52	6	814	750	692	132	117	192	166	114	17.6	12.8	68.4
West South Central	41	61	7	1,393	1,364	1,039	306	209	334	308	264	34.1	46.4	26.5
Pacific	40	52	16	2,443	2,431	2,094	471	415	639	640	590	16.7	13.5	8.3
Other divisions	26	35	5	736	712	632	118	110	147	156	148	16.5	7.3	- 0.7
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	84	87	32	12,063	11,466	9,783	1,586	1,394	1,950	1,840	2,128	23.5	13.8	- 8.4
Middle Atlantic	1/	1/	5	6,357	6,102	5,335	804	722	729	663	1,104	19.2	11.4	-34.0
East North Central	--	--	19	3,978	3,875	2,997	518	440	722	680	591	32.7	17.7	22.2
West North Central	--	--	3	1,748	1,689	1,451	264	232	499	497	433	20.5	13.8	15.2
Other divisions	--	--	5											

- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

DRUGS AND DRUG SUNDRIES

The business (excluding liquor sales) of 148 full-line drug wholesalers, houses which accounted for 61 percent of the total for the trede in 1935, remained relatively stable during 1937 and the first half of 1938. Sales were off 4.8 percent in the second as compared with the first quarter of this year, and by a similar percentage when the second quarter of 1938 is compered with the second quarter of 1937. Considering the year 1937 as a whole, sales of the 148 houses were 6.7 percent higher than for 1936. For the 106 wholesalers which handle no liquors, 1937 sales were 17 percent above 1935, the last year for which a regular census of business was taken. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the second wholesale report issued in connection with the Census Survey of Business for 1937-38.

Sales of 160 specialty-line houses, accounting for 35 percent of the specialty-line business in 1935, were up slightly (1.2%) in the second quarter over the first quarter of this year, but were off 3.6 percent in the second quarter of 1938 as compared with the second quarter of 1937. It is interesting to note that 54 manufacturers' sales branches, representing 33 percent of the total business of manufacturers' branches in 1935, show relatively greater losses than full-line or specialty-line wholesalers when the second quarter of 1938 is compered with the first quarter of this year and also when the second quarter of 1938 is compared with the second quarter of 1937. Omitting liquor business, gains for the year 1937 over 1936, however, are approximately the same for the three classes of establishments.

COMPARISON OF SALES BY QUARTERS

The percentage changes in net sales (without adjustments for seasonal veriation) of the full-line and specialty-line wholesalers and of the manufacturers' sales branches are given below in summary for the United States, by quarters for the year 1937 and the first half of 1938 and for the year 1937 as compared with 1936.

Period	Service and limited-function wholesalers			Manufacturers' Sales Branches (with stocks)
	Full-line			
	Drug Departments	Liquor Departments	Specialty Lines	
Number of establishments reporting	148	42	160	54
Percent increase (+) or decrease (-) in sales By quarters:				
1st Qr. to 2nd Qr. 1937	- 4.6	+ 0.9	- 1.7	- 16.5
2nd Qr. to 3rd Qr. 1937	+ 5.0	- 4.9	- 5.4	- 4.3
3rd Qr. to 4th Qr. 1937	+ 3.5	+ 53.3	+ 24.4	+ 1.8
4th Qr. 1937 to 1st Qr. 1938	- 7.9	- 34.7	- 19.1	+ 9.2
1st Qr. 1938 to 2nd Qr. 1938	- 4.8	+ 3.2	+ 1.2	- 15.9
1st Qr. 1937 to 1st Qr. 1938	- 4.6	- 3.9	- 6.3	- 11.2
2nd Qr. 1937 to 2nd Qr. 1938	- 4.8	- 1.7	- 3.6	- 10.5
Year 1936 to year 1937	+ 6.7	+ 43.8	+ 10.0	+ 9.5

Pay Roll Increases

A significant trend in the drug trade is noted when pay roll is compered with net seles. For the 106 full-line houses without liquor departments, pay roll rose from $7.10 for every $100 of sales in 1935 to $7.30 in 1937; to $7.60 in the first quarter, and to $8.00 in the second quarter of this year. Between 1935 and 1937, pay roll increased reletivsly more than sales but did not

register corresponding declines for the first two quarters of 1938. Correspondingly, pay roll for the 42 houses with liquor departments increased from $6.60 per $100 sales in 1935 to $6.80 in the second quarter of this year. For specialty-line houses, the increase was from $8.90 in 1935 to $10.30 in the second quarter of this year and for manufacturers' sales branches, it was from $8.40 to $9.70.

Pay roll as a percent of sales for the various classes of establishments -- 1935, 1937, and the first two quarters of 1938 -- is given below:

	1938		1937	1935
	2nd Qr.	1st Qr.		
Drugs (full-line)				
Without liquor (106 establishments)	8.0	7.6	7.3	7.1
With liquor (42 establishments)	6.8	6.9	6.6	6.6
Specialty-line wholesalers (160 establishments)	10.3	9.9	9.9	8.9
Mfrs.' Sales branches (54 establishments)	9.7	8.1	8.4	8.4

These and many other facts pertaining to the drug establishments reporting for this Survey are given in the attached tables by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by the 308 wholesalers and 54 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale drug trade. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935, are not canvassed and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale drug trade, those with sales for the year 1935 of less than $25,000 were omitted from the mailing list.

61 Percent Sample for Full-line Houses

Reporting for this Survey is purely on a voluntary basis; hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale drug establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 148 full-line houses represented 50 percent of the total number and accounted for 61 percent of the sales of all full-line houses in 1935. Likewise, the 160 specialty-line establishments represented 13 percent of the total number and accounted for 35 percent of the sales for this classification in 1935, and the 54 manufacturers' sales branches represented 20 percent of the number and 33 percent of the business. For convenience in evaluating their importance the percent sample, both of establishments and sales, is given for each classification in the first two columns of Tables 1 and 2 by geographic divisions.

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This is the second wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

DRUGS AND DRUG SUNDRIES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB-LISH-MENTS REPORT-ING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938			
	ESTAB-LISH-MENTS %	NET SALES %			1ST QR JAN. 1 MAR 31	2ND QR. APRIL 1 JUNE 30	3RD QR. JULY 1 SEPT. 30	4TH QR. OCT. 1 DEC. 31	1ST QR JAN 1 MAR 31	2ND QR APRIL 1 JUNE 30	1ST QR 1937 TO 1ST QR 1938	2ND QR 1937 TO 2ND QR 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
Drugs (full-line), Total	50	61	148	$241,722	$59,697	$57,347	$59,467	$65,211	$57,015	$54,655	- 4.5	- 4.3
Service Wholesalers												
Without liquor departments	--	--	96	112,599	28,328	26,890	28,115	29,266	27,090	25,753	- 4.4	- 4.2
With liquor departments 1/												
Drug departments	--	--	42	75,621	18,873	18,009	19,138	19,601	17,853	16,954	- 5.4	- 5.8
Liquor departments	--	--		34,112	7,663	7,750	7,373	11,306	7,384	7,618	- 3.9	- 1.7
Cooperatives and Mutuals	--	--	10	19,390	4,813	4,698	4,841	5,038	4,688	4,580	- 2.6	- 3.8
Geographic Divisions												
Drug departments												
New England	30	x	7	8,131	2,083	1,888	2,163	1,997	1,869	1,824	-10.3	- 3.4
Middle Atlantic	51	74	20	41,279	10,679	9,927	10,316	10,355	9,668	9,370	- 9.5	- 5.6
East North Central	50	56	28	39,973	9,701	9,364	9,883	10,025	8,757	8,342	- 9.7	-10.8
West North Central	41	58	13	25,470	6,296	6,234	6,520	6,418	6,028	5,945	- 4.3	- 4.6
South Atlantic	60	68	32	26,335	6,845	6,141	6,360	6,989	6,696	5,829	- 2.2	- 5.1
East South Central	56	76	15	15,760	3,688	3,728	3,792	3,952	3,618	3,589	- 6.9	- 9.1
West South Central	53	74	16	20,444	5,007	4,841	5,239	5,357	4,940	4,559	- 1.3	- 5.8
Mountain	59	x	10	8,907	2,206	2,111	2,283	2,305	2,209	2,196	0.0	+ 4.0
Pacific	42	50	10	22,711	5,305	5,363	5,536	6,507	5,636	5,783	+10.0	+ 7.8
Liquor departments	--	--	42	34,112	7,663	7,750	7,373	11,306	7,384	7,618	- 3.9	- 1.7
Drugs and drug sundries (specialty lines)	13	35	160	56,623	13,908	13,676	12,940	16,097	13,089	13,180	- 6.3	- 3.6
Drug specialties	16	27	55	9,692	2,621	2,381	2,366	2,324	2,019	1,904	-23.0	-20.0
Middle Atlantic	17	28	20	4,392	1,308	1,099	963	1,002	732	672	-44.0	-38.9
East North Central	20	30	12	2,052	525	501	516	510	487	472	- 7.2	- 5.8
South Atlantic	15	29	6	1,005	251	242	256	254	260	239	+ 3.6	- 1.2
East South Central	38	43	6	473	123	115	118	117	132	124	+ 7.3	+ 7.8
Other divisions	10	21	11	1,770	414	424	491	441	408	397	- 1.5	- 6.4
Drug proprietories and toiletries	11	30	69	24,806	5,705	5,389	5,476	7,666	5,069	5,293	-11.1	- 1.8
Middle Atlantic	16	38	41	16,324	3,849	3,500	3,736	5,239	3,407	3,571	-11.5	+ 2.0
East North Central	7	11	10	2,063	466	397	471	749	416	391	-10.7	- 1.5
Pacific	10	75	8	4,428	977	1,046	986	1,419	891	947	- 8.8	- 9.5
All other divisions	6	9	10	1,369	413	416	281	259	355	384	-14.0	- 7.7
Druggists sundries	13	52	36	22,725	5,582	5,356	5,098	6,107	5,941	5,983	+ 6.4	+ 0.8
Middle Atlantic	16	57	19	9,623	2,366	2,508	2,213	2,536	2,406	2,444	+ 1.7	- 2.6
All other divisions	10	47	17	13,102	3,216	3,430	2,885	3,571	3,535	3,539	+ 9.9	+ 3.2
MANUFACTURERS' SALES BRANCHES												
Geographic Divisions												
UNITED STATES	20	33	54	52,416	15,203	12,695	12,148	12,370	13,507	11,356	-11.2	-10.5
Middle Atlantic	19	36	16	16,748	4,483	3,126	3,663	5,330	3,904	7,093	-10.8	-12.7
East North Central	21	28	11	6,853	1,984	1,702	1,515	1,652	1,672	1,403	-15.7	-17.6
West North Central	23	26	6	2,800	751	617	703	729	699	629	- 6.9	+ 1.9
Pacific	22	36	8	4,241	1,220	976	1,014	1,031	1,117	981	- 8.4	+ 0.5
All other divisions	17	32	11	5,760	1,825	1,274	1,253	1,428	1,615	1,252	-11.5	- 1.7

+ INCREASE. - DECREASE

※ PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

1/INCLUDES ONE COOPERATIVE

x WITHHELD TO AVOID DISCLOSURE OF INDIVIDUAL OPERATIONS

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

DRUGS AND DRUG SUNDRIES

TABLE 2.-SALES, PAYROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
Drugs (full-line), Total	50	61	148	$241,722	$218,288	$196,408	$16,773	$13,558	$41,366	$32,051	$33,253	23.1	23.7	24.4
Service Wholesalers														
Without liquor departments	--	--	96	112,599	103,970	96,443	8,329	7,140	19,125	17,408	16,838	16.8	16.7	17.8
With liquor departments 1/														
Drug departments	--	--	42	75,621	73,064	63,526	5,814	5,492	13,268	13,008	14,710	31.4	31.0	32.6
Liquor departments	--	--		34,115	23,723		1,375		6,243	6,127				
Cooperatives and Mutuals	--	--	10	19,390	17,531	16,439	1,252	923	2,730	2,514	2,305	18.0	35.6	18.4
Geographic Divisions														
New England														
Drug departments	30	x	7	8,131	7,839	8,098	554	554	1,213	1,209	1,237	16.4	11.7	16.7
Liquor departments				1,299	758		65		231	196				
Middle Atlantic														
Drug departments	51	74	20	41,279	39,927	39,861	2,818	2,539	5,526	5,208	5,494	17.8	17.6	18.8
Liquor departments				4,511	2,233		167		569	626				
East North Central														
Drug departments	50	56	25	39,973	35,304	33,975	2,860	2,462	5,545	4,974	4,912	29.1	23.6	25.5
Liquor departments				4,881	3,312		182		622	609				
West North Central														
Drug departments	41	58	13	25,470	23,908	26,476	2,032	1,910	3,839	3,778	4,188	10.0	15.1	6.1
Liquor departments				3,662	2,994		166		603	641				
South Atlantic														
Drug departments	60	68	32	25,335	24,234	23,831	1,848	1,601	4,708	4,493	4,410	29.4	23.8	26.5
Liquor departments				4,508	3,080		134		870	701				
East South Central														
Drug departments	56	76	15	15,360	14,306	13,157	1,156	986	2,508	2,439	2,329	19.9	18.9	11.1
Liquor departments				414	315		17		80	40				
West South Central														
Drug departments	53	74	16	20,444	19,589	19,761	1,567	1,381	4,152	3,845	4,183	34.9	29.3	34.5
Liquor departments				6,220	4,176		218		1,473	1,215				
Mountain														
Drug departments	59	x	10	8,907	8,283	8,741	621	541	1,844	1,594	1,591	23.5	25.9	29.2
Liquor departments				1,891	1,512		60		212	258				
Pacific														
Drug departments	42	50	10	22,711	21,175	23,508	1,940	1,581	5,798	5,384	4,909	25.2	46.0	48.1
Liquor departments				6,726	5,343		369		1,483	1,794				
Drugs and drug sundries (specialty line)	13	35	160	56,623	51,473	42,854	5,591	3,834	4,760	4,027	4,888	32.1	45.8	- 2.6
Drug specialties	16	27	55	9,692	8,908	8,124	855	682	1,420	1,287	1,263	19.3	25.4	12.4
Middle Atlantic	17	28	20	4,392	4,030	3,550	286	196	588	436	360	23.7	46.9	38.9
East North Central	20	30	12	2,058	1,909	1,770	246	206	313	293	281	15.9	19.4	11.4
South Atlantic	15	29	6	1,005	925	995	91	75	174	167	189	1.0	21.3	- 7.9
East South Central	38	43	6	473	448	411	44	46	92	95	104	15.1	- 4.3	-11.5
All other divisions	10	21	11	1,770	1,590	1,398	186	159	313	296	309	26.6	17.0	1.3
Drug proprietories and toiletries	11	30	69	24,208	21,982	18,495	3,667	2,331	2,430	2,242	2,084	30.9	57.3	20.1
Middle Atlantic	16	36	41	15,326	14,780	11,991	2,446	1,460	1,909	1,820	1,588	36.2	67.5	28.7
East North Central	7	11	10	2,083	1,689	1,310	323	154	170	163	157	59.0	109.7	8.3
Pacific	10	75	8	4,428	4,219	3,986	714	561	417	436	427	11.1	27.3	- 2.3
All other divisions	6	9	10	1,369	1,354	1,208	184	156	134	123	112	13.3	17.9	19.6
Druggists' sundries	13	52	36	22,725	20,589	16,235	1,069	881	910	498	1,601	40.0	30.2	-43.2
Middle Atlantic	16	57	19	9,623	8,549	6,549	340	230	279	252	979	11.3	47.8	-71.5
All other divisions	10	47	17	13,102	14,587	7,586	729	591	631	246	622	72.7	23.4	1.4
MANUFACTURERS' SALES BRANCHES														
Geographic Divisions														
UNITED STATES	20	33	54	52,416	47,861	42,917	4,428	3,599	4,378	3,547	4,801	22.1	23.0	4.2
Middle Atlantic	19	36	18	32,748	29,065	25,754	2,721	2,059	3,063	2,428	2,110	27.1	32.2	45.2
East North Central	21	28	11	6,853	6,693	5,897	403	364	224	206	359	16.2	10.7	-37.6
West North Central	23	26	6	2,800	2,598	2,408	354	284	296	228	396	12.5	9.5	-25.3
Pacific	22	36	8	4,241	3,925	3,346	469	360	410	302	543	26.7	23.4	-24.5
All other divisions	17	32	11	5,780	5,565	5,432	481	472	385	359	793	6.4	1.9	-51.5

x PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

** PAY ROLL NOT AVAILABLE FOR YEAR 1936. PAY ROLL INCLUDES COMPENSATION OF BOTH FULL-TIME AND PART-TIME EMPLOYEES, BUT NOT OF PROPRIETORS AND FIRM MEMBERS OF UNINCORPORATED BUSINESSES. - DECREASE

1/ INCLUDES ONE COOPERATIVE

X WITHHELD TO AVOID DISCLOSURE OF INDIVIDUAL OPERATIONS

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

DRY GOODS

Dollar sales of 730 dry goods wholesalers -- identical establishments which accounted for 33 percent of the total business of all service and limited-function wholesalers in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were 16.8 percent less than for the first quarter, and were 23.6 percent under the sales for the same quarter of 1937. Considering 1937 as a whole, sales of the 730 wholesalers were 3.9 percent above 1936 and 16.7 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Of the 730 dry goods wholesalers included in the Survey, 89 are classified as full-line houses, while 188 specialize in the sale of notions, 397 in the piece goods business and 56 in miscellaneous lines of dry goods. Dollar sales of each class of establishment increased in the third quarter over the second quarter of 1937 after which they declined quarterly. Exceptions to this trend are found for piece goods houses whose sales rose 13.0 percent in the first quarter of this year over the preceding period and then declined 22.1 percent in the second quarter of 1938, and miscellaneous dry goods sales were up slightly in the second quarter over the first quarter of 1938.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Total	Dry Goods (Full-line)	Dry Goods (Specialty-lines)		
			Notions	Piece Goods	All other
Number of establishments included	730	89	188	397	56
Percent increase (+) or decrease (-) in sales					
1st Qr. to 2nd Qr. 1937	- 19.7	- 5.8	- 16.5	- 25.1	- 8.1
2nd Qr. to 3rd Qr. 1937	+ 9.4	+ 23.0	+ 11.2	+ 3.4	+ 8.7
3rd Qr. to 4th Qr. 1937	- 15.6	- 13.4	- 8.7	- 18.5	- 3.9
4th Qr. 1937 to 1st Qr. 1938	- 0.6	- 22.1	- 5.6	+ 13.0	- 28.1
1st Qr. 1938 to 2nd Qr. 1938	- 16.8	- 4.6	- 14.1	- 22.1	+ 0.2
1st Qr. 1938 vs 1st Qr. 1937	- 26.3	- 21.9	- 20.0	- 28.7	- 30.9
2nd Qr. 1938 vs 2nd Qr. 1937	- 23.6	- 20.8	- 17.6	- 25.9	- 24.7

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks when 1937 is compared with 1935. Dollar sales of 89 full-line houses were up 9.7 percent as compared with an increase of 7.5 percent in pay roll. Stocks, however, rose 15.0 percent. For each of the specialty lines (notions) piece goods, miscellaneous lines) pay roll increased relatively more than sales. Likewise, the stocks of notion establishments increased 15.6 percent against a 10.2 percent increase in sales and the dollar value of stocks in miscellaneous houses increased 16.6 percent while sales were up only 5.9 percent.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks are given below by class of establishment.

	Percent increase, 1937 over 1935		
	Dollar sales	Pay roll	Stocks (end of year)
Total (730 establishments)	16.7	22.5	11.5
Dry goods, full-line, (89 establishments)	9.7	7.5	15.0
Dry goods, (specialty-lines):	--	--	--
Notions (188 establishments)	10.2	34.3	15.6
Piece goods (397 establishments)	21.8	29.7	8.9
All other (56 establishments)	5.9	13.8	16.6

These and other facts pertaining to the sales, pay roll and stocks of 730 dry goods wholesalers, plus 60 manufacturers' sales branches, are given in the two attached tables, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 730 establishments which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale dry goods business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935 are not canvassed and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale dry goods business, those with sales for the year 1935 of less than $25,000 were omitted from this Survey.

33 Percent Sample

Reporting for this Survey is purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those which operated as wholesale dry goods establishments for the entire year 1935, and which still operate in a similar manner.

The importance of those included herein is shown by the fact that the 730 establishments, (service and limited-function wholesalers) represented 20 percent of the number, and accounted for 33 percent of the total sales of this kind of business in 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample of the establishments and of sales is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

DRY GOODS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB-LISH-MENTS REPORT-ING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938			
	ESTAB-LISH-MENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	1ST QR 1937 To 1ST QR 1938	2ND QR 1937 To 2ND QR 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	20	33	730	$376,797	$110,093	$88,422	$96,702	$81,580	$81,117	$67,513	-26.3	-23.6
Dry goods (full line)	29	34	89	98,217	23,940	22,540	27,724	24,013	18,709	17,847	-21.9	-20.8
Dry goods (specialty lines)												
Notions	21	40	188	42,956	11,896	9,930	11,043	10,087	9,519	8,179	-20.0	-17.6
Piece goods	21	32	397	228,323	72,375	54,222	56,054	45,672	51,569	40,184	-28.7	-25.9
All other	11	24	56	7,301	1,882	1,730	1,881	1,808	1,300	1,303	-30.9	-24.7
Geographic Divisions												
Dry goods (full line)												
Middle Atlantic	23	22	15	9,993	2,211	2,476	2,587	2,719	1,663	1,646	-24.8	-25.4
East North Central	26	42	7	32,588	8,250	7,842	8,592	7,904	6,276	6,075	-23.9	-22.5
West North Central	44	18	11	11,948	2,743	2,536	3,689	2,980	2,392	2,342	-12.8	- 7.7
South Atlantic	30	35	21	12,406	2,966	2,746	3,499	3,195	2,306	2,040	-22.3	-25.7
East South Central	30	44	14	9,364	2,507	1,890	2,818	2,169	1,954	1,555	-22.1	-17.7
West South Central	22	41	8	10,525	2,539	2,188	3,337	2,467	2,085	1,822	-17.9	-16.5
Pacific	71	100	10	10,016	2,415	2,550	2,848	2,203	1,806	1,947	-25.2	-23.6
Other divisions	13	17	3	1,357	309	318	354	376	227	220	-26.5	-30.8
Dry goods (specialty lines)												
Notions												
Middle Atlantic	22	42	154	39,187	10,940	9,009	10,082	9,156	8,682	7,366	-20.6	-18.2
East North Central	19	25	18	1,638	417	404	434	383	338	338	-18.9	-16.3
Other divisions	14	39	16	2,131	539	517	527	548	499	475	- 7.4	- 8.1
Piece goods												
New England	17	17	16	3,951	1,223	886	1,006	836	912	564	-25.4	-36.3
Middle Atlantic	21	32	218	203,478	64,610	48,170	50,026	40,672	46,364	36,263	-28.2	-24.7
East North Central	22	35	21	8,483	2,725	2,144	2,041	1,573	1,626	1,248	-40.3	-41.8
South Atlantic	13	16	4	912	271	275	178	188	199	180	-26.6	-34.5
Pacific	36	44	38	9,799	3,054	2,245	2,421	2,079	2,172	1,632	-28.9	-27.3
Other divisions	19	24	6	1,700	492	502	382	324	316	297	-35.8	-40.8
All other												
Middle Atlantic	12	25	40	5,750	1,499	1,370	1,475	1,406	1,022	1,022	-31.8	-25.4
East North Central	14	24	9	704	177	168	176	183	119	119	-32.8	-29.2
Other divisions	8	22	7	847	206	198	230	219	159	168	-22.8	-15.6
MANUFACTURERS' SALES BRANCHES												
Dry goods (specialty lines)	29	19	60	36,546	11,116	9,244	8,914	7,272	7,816	6,247	-29.7	-32.4
Middle Atlantic	18	13	20	21,140	6,341	5,039	5,275	4,485	4,270	3,138	-32.7	-37.7
East North Central	44	47	15	5,380	1,798	1,470	1,162	950	1,082	924	-39.8	-37.1
Pacific	36	47	12	3,817	1,002	1,136	917	762	918	976	- 8.4	-14.1
Other divisions	43	57	13	6,209	1,975	1,599	1,560	1,075	1,546	1,209	-21.7	-24.4

- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

DRY GOODS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (000 omitted)			PAY ROLL** (000 omitted)		STOCKS ON HAND END OF YEAR (000 omitted)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	20	33	730	$376,797	$362,556	$328,906	$ 28,257	$ 23,072	$ 65,007	$ 61,891	$ 58,281	16.7	22.5	11.5
Dry goods (full line)	29	34	89	98,217	96,592	89,540	8,642	8,037	18,114	17,207	15,746	9.7	7.5	15.0
Dry goods (specialty lines)														
Notions	21	40	188	42,956	43,288	38,996	6,064	4,515	8,402	7,573	7,269	10.2	34.3	15.6
Piece Goods	21	32	397	228,323	214,971	189,477	12,885	9,917	37,259	35,862	34,209	21.8	29.7	8.9
All other	11	24	56	7,301	7,705	6,893	686	603	1,232	1,249	1,057	5.9	13.8	16.6
Geographic Divisions														
Dry goods (full line)														
Middle Atlantic	23	22	15	9,993	9,930	8,755	970	706	1,902	1,743	1,720	14.1	37.4	10.6
East North Central	26	42	7	32,588	31,471	29,317	2,847	2,785	4,613	4,497	4,053	10.4	2.2	13.8
West North Central	44	18	11	11,948	11,639	11,683	1,140	1,114	2,251	2,008	2,020	2.3	2.3	11.4
South Atlantic	30	35	21	12,406	12,582	11,035	1,153	1,058	2,656	2,376	2,099	12.4	9.0	26.5
East South Central	20	44	14	9,364	9,582	9,705	864	799	1,761	1,832	2,035	- 3.3	10.6	-13.5
West South Central	22	41	8	10,525	10,335	8,992	780	767	2,013	2,427	1,598	17.0	1.7	25.0
Pacific	71	100	10	10,016	9,389	8,378	737	681	2,526	1,985	1,837	19.6	8.2	37.5
Other divisions	13	17	3	1,357	1,464	1,475	131	127	372	329	384	- 8.0	3.1	- 3.1
Dry goods (specialty lines)														
Notions														
Middle Atlantic	22	42	154	39,187	39,688	35,585	5,610	4,105	7,633	6,860	6,564	10.1	36.7	16.3
East North Central	19	25	18	1,638	1,555	1,329	141	125	288	255	210	23.3	28.8	37.1
Other divisions	14	39	16	2,131	2,045	2,082	293	285	481	458	495	2.4	2.8	- 2.8
Piece goods														
New England	17	17	16	3,951	3,392	2,798	160	133	496	400	334	41.2	20.3	48.5
Middle Atlantic	21	32	312	203,478	190,836	166,280	11,118	8,651	33,406	31,792	31,019	22.4	28.4	7.7
East North Central	22	35	21	8,483	8,195	7,170	577	377	1,140	1,293	876	18.3	53.1	30.1
South Atlantic	13	16	4	912	855	709	43	47	300	227	220	28.6	- 8.5	36.4
Pacific	36	44	36	9,793	9,987	9,113	830	591	1,621	1,789	1,473	7.5	40.4	10.0
Other divisions	19	24	6	1,700	1,706	1,467	143	118	296	361	287	15.9	21.2	3.1
All other														
Middle Atlantic	12	25	40	5,750	6,144	5,444	472	418	882	932	736	5.6	12.9	19.8
East North Central	14	24	9	704	712	635	93	61	114	110	108	10.9	14.8	5.6
Other divisions	8	22	7	847	849	814	121	104	236	207	213	4.1	16.3	10.8
MANUFACTURERS' SALES BRANCHES (with stocks)														
Dry goods (specialty lines)	29	19	60	36,546	37,525	34,987	2,714	2,396	6,448	5,192	4,915	4.5	12.9	31.2
Middle Atlantic	18	13	20	21,140	21,788	20,169	1,793	1,556	4,399	3,766	3,642	4.8	15.3	24.2
East North Central	44	47	15	5,380	5,547	4,932	300	290	665	385	372	9.1	3.4	78.8
Pacific	36	47	12	3,817	3,622	3,887	220	161	719	633	591	- 1.8	21.5	21.7
Other divisions	43	57	13	6,209	6,571	5,999	401	370	665	418	410	3.5	8.4	62.2

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

ELECTRICAL GOODS

Net sales of 596 electrical wholesalers -- establishments which accounted for 25 percent of the number and 45 percent of the total business of all service and limited-function electrical wholesalers in 1935 -- increased 14.7 percent in the second quarter over the first quarter of 1938. However, sales were off 37.9 percent in the second quarter of 1938 as compared with the second quarter of 1937. For the year 1937 as a whole, dollar sales of the 596 houses were 66.3 percent higher than for 1935, the latest year covered by a regular business census.

In addition to the 596 wholesalers, 215 manufacturers' sales branches were reported for the current Survey of Business. The business of these branches declined each successive period from the first quarter of 1937 through the second quarter of this year with the result that sales for the second quarter of 1938 were 38.0 percent less than for the similar period of 1937. Their 1937 business, however, exceeded dollar sales for the year 1935 by 80.9 percent. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business: 1937-38.

Wholesale electrical houses are divided, for the purpose of this release, into those selling a more or less full line of electrical goods (including wiring supplies and construction materials establishments); apparatus and equipment wholesalers; and establishments engaged primarily in selling radios, refrigerators and other appliances. Dollar sales of each class of establishment reached their high, for the year 1937 and the first half of 1938, in the second quarter of last year after which they declined sharply. For full-line houses, the decline continued until the second quarter of this year when an upturn of 14.2 percent over the first quarter of 1938 is noted. Radio, refrigerator and other appliances establishments show gains for both the first and second quarter of this year but their business was still off 45.6 percent in the second quarter of 1938 as compared with the second quarter of 1937.

COMPARISON OF SALES BY QUARTERS

The number of the various classes of establishments reporting together with the percentage change in net sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938 is given below:

PERIOD	Service and limited-function wholesalers selling principally---				Manufacturers' Sales Branches
	Total	Electrical Goods (Full-line)	Apparatus and Equipment	Radios, Refrigerators, Appliances	
Number of establishments included	596	405	23	168	215
Percent increase (+) or decrease (-) in sales					
1st Qr. to 2nd Qr. 1937	+ 35.2	+ 29.6	+ 22.7	+ 46.1	- 0.3
2nd Qr. to 3rd Qr. 1937	- 22.4	- 13.3	- 2.5	- 37.8	- 13.9
3rd Qr. to 4th Qr. 1937	- 12.6	- 5.0	- 22.0	- 29.2	- 12.3
4th Qr. 1937 to 1st Qr. 1938	- 20.3	- 28.9	- 15.7	+ 5.6	- 8.4
1st Qr. 1938 to 2nd Qr. 1938	+ 14.7	+ 14.2	- 11.0	+ 17.1	- 10.4
1st Qr. 1937 to 1st Qr. 1938	- 26.8	- 24.1	- 21.3	- 32.0	- 31.0
2nd Qr. 1937 to 2nd Qr. 1938	- 37.9	- 33.1	- 42.9	- 45.6	- 38.0

1937 Compared with 1935

Considered on an annual basis, sales of all classes of establishments increased substantially in 1937 over 1935. The business of the 405 full-line houses was up 72.3 percent; of apparatus and equipment wholssalers 69.0 percent; and of radios, refrigerators and other appliances, 55.1 percent. As stated above, manufacturers' sales branches gained 80.9 percent in 1937 over 1935. Sales for each class of establishment show a somewhat greater increase than either pay roll or the value of stocks on hand. An exception to this rule is found for radios, refrigerators and appliances where the value of

merchandise on hand increased 83.0 percent between 1935 and 1937, whereas sales were up only 55.1 percent.

The percentage increases, 1935 over 1937, in sales, pay roll and stocks on hand for the various classes of establishments, are given below:

ITEM	Service and limited-function wholesalers selling principally ---				Manufacturers' Sales Branches
	Total	Electrical Goods (Full-line)	Apparatus and Equipment	Radios, Refrigerators, Appliances	
Number of establishments reporting	596	405	23	168	215
Sales (percent increase 1935 to 1937)	66.3	72.3	69.0	55.1	80.9
Pay roll (percent increase 1935 to 1937)	54.2	64.7	53.7	38.2	21.9
Stocks (percent increase 1935 to 1937)	66.2	60.5	40.4	83.0	65.4

These and many other facts pertaining to the wholesale electrical establishments reporting for this Survey are given in the attached tables by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 596 wholesalers and 215 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale electrical trade. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935 are not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale electrical trade, wholesalers whose sales for the year 1935 amounted to less than $25,000 were also omitted from the mailing list.

45 Percent Sample for Wholesalers

Reporting for this Survey is purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. The houses and branches included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale electrical goods establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 596 wholesalers (service and limited-function) represented 25 percent of the number and accounted for 45 percent of all sales in 1935. Likewise, the 215 manufacturers' sales branches represented 50 percent of the number of branches and 90 percent of their sales for the year 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample, both of the establishments and sales, is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

- 0 -

This is the fifth wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

ELECTRICAL GOODS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB LISH. MENTS REPORT ING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1938	2ND QR. 1937 TO 1938
	ESTAB. LISH. MENTS %	* NET SALES %			1ST QR. JAN. 1 MAR. 31	2ND QR. APRIL 1 JUNE 30	3RD QR. JULY 1 SEPT 30	4TH QR. OCT. 1 DEC. 31	JAN. 1 MAR. 31	2ND QR. APRIL 1 JUNE 30		
SERVICE WHOLESALERS												
UNITED STATES	25	45	596	$427,425	$98,933	$133,798	$103,891	$90,803	$72,405	$83,083	-26.8	-37.9
Electrical goods (full line) 1/	30	63	405	288,464	68,959	81,612	70,724	67,171	47,798	54,560	-24.1	-33.1
Apparatus and equipment	13	22	23	7,266	1,668	2,046	1,995	1,557	1,313	1,169	-21.3	-42.9
Radios, refrigerators and appliances	15	50	168	137,695	34,308	50,140	31,172	22,075	23,314	27,894	-32.0	-45.6
Electrical goods (full line) 1/												
New England	33	68	39	21,123	4,793	5,883	5,203	5,244	3,255	4,122	-32.1	-29.9
Middle Atlantic	37	53	103	61,882	13,659	17,207	15,446	15,570	10,836	11,316	-25.1	-34.2
East North Central	34	62	75	70,241	15,546	20,155	17,870	16,670	11,490	12,158	-26.1	-39.7
West North Central	51	78	48	29,673	6,136	8,309	7,329	7,909	5,463	7,176	-11.0	-15.7
South Atlantic	46	61	50	28,334	6,535	8,547	6,972	6,280	4,538	5,498	-31.7	-35.7
East South Central	47	55	14	8,545	1,945	2,509	2,212	1,879	1,518	1,533	-22.0	-34.9
West South Central	43	62	23	16,484	3,681	5,249	4,068	3,558	3,160	3,672	-12.7	-30.0
Mountain	40	65	12	8,743	2,068	2,640	2,054	1,981	1,544	1,813	-25.3	-31.3
Pacific	36	71	47	37,439	8,554	10,913	8,966	9,006	6,580	7,172	-23.1	-34.3
Apparatus and equipment												
Middle Atlantic	12	23	8	4,359	964	1,272	1,271	852	733	739	-24.0	-41.9
East North Central	11	21	6	1,732	449	469	419	415	343	213	-23.6	-54.6
Pacific	17	21	4	522	109	144	141	128	100	83	- 8.3	-42.4
Other divisions	16	18	5	633	146	161	164	162	137	134	- 6.2	-16.8
Radios, refrigerators and appliances												
New England	14	48	10	9,325	2,549	3,278	2,109	1,389	1,299	1,929	-49.0	-41.2
Middle Atlantic	13	13	36	17,775	4,635	7,495	5,581	3,994	3,335	4,402	-28.0	-41.3
East North Central	17	50	46	59,463	15,785	23,034	12,184	8,580	9,909	10,598	-37.2	-54.0
West North Central	8	28	9	9,865	2,746	3,578	2,123	1,438	1,937	2,190	-33.1	-38.9
South Atlantic	14	37	15	11,363	2,642	3,959	2,601	1,841	1,978	2,804	-25.1	-44.3
East South Central	19	26	6	3,923	887	1,506	917	613	821	872	- 7.4	-42.1
West South Central	25	35	14	8,618	1,977	3,216	2,142	1,283	1,715	2,066	-13.3	-35.8
Mountain	11	24	3	1,726	434	598	441	253	302	414	-30.4	-30.8
Pacific	19	35	29	12,037	2,653	3,476	3,164	2,744	2,118	2,619	-20.2	-24.7
MANUFACTURERS' SALES BRANCHES												
UNITED STATES	50	90	215	567,686	157,339	156,874	135,086	118,451	108,486	97,835	-31.0	-38.0
Electrical goods												
New England	50	95	14	40,795	11,008	11,044	9,769	8,974	8,034	6,392	-27.0	-42.1
Middle Atlantic	53	92	47	164,055	45,906	47,195	38,129	32,825	32,608	29,316	-29.0	-37.9
East North Central	50	83	55	159,665	46,735	44,860	36,460	32,610	25,868	23,494	-44.7	-46.9
West North Central	60	95	26	50,970	13,039	14,177	13,046	10,708	10,526	9,679	-19.3	-31.7
South Atlantic	45	98	20	49,309	13,477	12,138	10,966	12,728	7,985	9,475	-41.9	-21.9
East South Central	45	81	13	24,169	6,936	6,111	5,868	5,254	4,524	4,585	-34.8	-21.0
Pacific	48	89	30	58,271	15,302	16,880	13,851	12,836	14,916	10,919	- 2.5	-35.3
Other divisions	43	96	10	20,454	4,934	5,069	6,938	3,513	4,191	3,135	-15.1	-38.2

– DECREASE

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

1/ INCLUDES HOUSES FORMERLY CLASSIFIED AS "WIRING SUPPLIES AND CONSTRUCTION MATERIALS."

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

ELECTRICAL GOODS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL* (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE WHOLESALERS														
UNITED STATES	25	45	596	$427,425	$344,364	$257,005	$33,717	$21,868	$40,464	$32,548	$24,346	66.3	54.2	66.2
Electrical goods (full line) 1/	35	63	405	282,464	231,165	163,910	21,083	12,798	27,697	23,660	17,255	72.3	64.7	60.5
Apparatus and equipment	13	22	23	7,256	5,791	4,300	1,007	655	686	604	490	69.0	53.7	40.4
Radios, refrigeratore and appliances	15	30	168	137,695	117,408	88,795	11,627	8,415	12,079	8,284	6,601	55.1	38.2	83.0
Electrical goods (full line) 1/														
New England	33	68	39	21,123	17,553	14,053	1,574	1,099	2,155	1,918	1,721	50.3	43.2	25.2
Middle Atlantic	27	53	103	61,882	49,913	37,854	5,008	3,210	5,511	5,059	3,723	67.0	55.8	48.0
East North Central	34	62	75	70,241	52,301	36,789	5,116	2,901	6,255	4,985	3,502	90.9	82.6	78.6
West North Central	51	72	48	29,673	22,850	18,058	2,208	1,504	2,910	2,560	1,948	64.3	46.4	58.0
South Atlantic	46	61	50	28,334	22,314	15,908	2,128	1,220	3,013	2,473	1,787	67.6	74.4	68.6
East South Central	47	55	14	8,545	5,584	3,407	465	165	831	693	431	150.8	181.8	97.4
West South Central	43	62	23	16,484	11,917	7,584	1,033	544	1,673	1,267	911	119.1	89.9	83.6
Mountain	40	65	12	8,745	6,981	5,531	575	389	905	735	559	58.1	47.8	44.0
Pacific	36	71	47	39,439	31,677	24,586	2,988	1,866	4,544	3,871	2,789	62.3	60.1	62.9
Apparatus and equipment														
Middle Atlantic	12	23	8	4,359	3,456	2,630	374	298	314	296	255	65.7	25.5	23.1
East North Central	11	21	6	1,752	1,406	1,059	444	230	204	162	100	65.4	93.0	104.0
Pacific	17	21	4	522	458	286	94	67	102	93	58	82.5	40.3	24.4
Other divisions	16	18	5	633	477	325	95	60	68	53	53	94.8	58.3	28.3
Radios, refrigeratore and appliances														
New England	14	46	10	9,325	8,211	6,194	773	594	754	418	453	50.6	30.1	66.4
Middle Atlantic	13	13	26	21,675	18,453	14,665	2,593	1,793	2,293	1,798	1,397	47.8	44.6	64.1
East North Central	17	50	46	59,465	45,782	32,999	4,117	2,856	2,565	1,805	1,378	80.2	44.2	86.1
West North Central	8	28	9	9,885	9,581	6,896	926	743	1,366	1,013	724	43.3	24.6	88.7
South Atlantic	14	37	15	11,045	10,233	8,885	881	822	1,293	914	788	24.3	7.2	64.7
East South Central	19	25	6	3,923	3,158	1,688	288	136	352	223	173	132.0	111.8	103.2
West South Central	25	35	14	8,618	7,710	5,598	703	472	1,157	837	622	53.9	48.9	86.0
Mountain	11	24	3	1,726	1,521	1,252	181	130	258	169	137	37.9	39.2	33.0
Pacific	19	35	29	12,037	10,759	10,687	1,165	869	2,031	1,409	882	12.6	34.1	130.3
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	50	90	215	$567,688	$447,576	$313,815	$18,174	$14,304	$27,986	$23,707	$16,923	80.9	21.9	65.4
Electrical goods														
New England	50	95	14	40,795	32,894	24,437	1,874	1,040	1,633	1,298	933	66.9	22.5	75.0
Middle Atlantic	53	92	47	164,055	126,906	102,003	5,575	4,629	6,929	5,850	4,222	60.8	20.4	64.1
East North Central	50	83	55	159,665	120,879	83,869	5,407	4,535	5,882	5,107	3,996	91.7	16.7	72.2
West North Central	60	95	26	50,970	45,964	28,547	1,519	1,213	2,547	2,172	1,603	78.5	25.2	58.9
South Atlantic	45	98	20	49,309	41,779	33,838	1,186	917	2,881	2,092	1,788	106.9	29.3	81.4
East South Central	45	81	13	24,169	16,089	9,699	662	415	1,345	1,172	1,061	149.2	59.5	84.4
Pacific	48	89	30	58,871	46,567	30,827	2,085	1,735	4,701	4,022	2,821	69.0	20.2	66.7
Other divisions	43	96	10	20,454	14,718	11,195	466	320	1,068	994	680	82.7	45.3	57.1

% PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

* PAY ROLL NOT AVAILABLE FOR YEAR 1936. PAY ROLL INCLUDES COMPENSATION OF BOTH FULL-TIME AND PART-TIME EMPLOYEES, BUT NOT OF PROPRIETORS AND FIRM MEMBERS OF UNINCORPORATED BUSINESSES.

1/ INCLUDES HOUSES FORMERLY CLASSIFIED AS "WIRING SUPPLIES AND CONSTRUCTION MATERIALS."

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38

Wholesale Distribution

FARM AND DAIRY MACHINERY AND EQUIPMENT

Dollar sales of 168 manufacturers' sales branches engaged primarily in selling farm and dairy machinery and equipment -- identical establishments accounting for 78 percent of the total business of all branches during 1935, the latest year covered by a regular business census -- increased 12.2 percent in the second quarter over the first quarter of 1938, but were 26.1 percent short of sales for the second quarter of 1937. However, their total sales for the year 1937 were 25.9 percent above 1936 and 69.5 percent higher than for the year 1935.

In addition to the manufacturers' sales branches, 50 wholesalers are included in this Survey. Dollar sales of the wholesalers increased 15.1 percent in the second quarter over the first quarter of this year, but were 21.5 percent under sales for the same quarter of 1937. Their 1937 sales exceeded the total for 1935 by 42.7 percent. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, are given below:

PERIOD	Manufacturers' sales branches	Service and limited-function wholesalers
Number of establishments included	168	50
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 38.2	+ 46.9
2nd Qr. to 3rd Qr. 1937	- 16.8	- 20.3
3rd Qr. to 4th Qr. 1937	- 40.3	- 44.8
4th Qr. 1937 to 1st Qr. 1938	+ 32.9	+ 55.0
1st Qr. 1938 to 2nd Qr. 1938	+ 12.2	+ 15.1
1st Qr. 1938 vs. 1st Qr. 1937	- 8.9	+ 0.2
2nd Qr. 1938 vs. 2nd Qr. 1937	- 26.1	- 21.5

1937 Compared with 1935

Substantial increases are noted in sales and pay roll for 1937 as compared with 1935. Dollar sales of the 168 manufacturers' sales branches were up 69.5 percent as compared with a 43.6 percent increase in pay roll, and the 50 wholesalers show a 42.7 percent rise in sales with a 25.0 percent increase in pay roll.

	Percent increase, 1937 over 1935	
	Sales	Pay roll
168 Manufacturers' sales branches	69.5	43.6
50 Service and limited-function wholesalers	42.7	25.0

These and other facts pertaining to sales, pay roll and stocks of wholesale farm and dairy machinery and equipment establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 168 manufacturers' sales branches and 50 wholesalers which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale farm and dairy machinery and equipment business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and wholesalers that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale farm and dairy machinery and equipment business, those with sales for the year 1935 of less than $25,000 were also omitted.

78% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale farm and dairy machinery and equipment houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 168 manufacturers' sales branches represent 67 percent of the number and accounted for 78 percent of the business of all branches in 1935, and the 50 service and limited-function wholesalers represent 15 percent of the total number and accounted for 37 percent of the sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

FARM AND DAIRY MACHINERY AND EQUIPMENT

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census: Estab-lishments %	Size Of Sample Compared With 1935 Census: Net* Sales %	No. Of Estab-lishments Included In 1937-38 Survey	Net* Sales Year 1937 (add 000)	Net Sales By Quarters (add 000): 1937 1st Qr. Jan. 1 Mar. 31	1937 2nd Qr. April 1 June 30	1937 3rd Qr. July 1 Sept. 30	1937 4th Qr. Oct. 1 Dec. 31	1938 1st Qr. Jan. 1 Mar. 31	1938 2nd Qr. April 1 June 30	Percent Change: 1st Qr. 1937 To 1st Qr. 1938	Percent Change: 2nd Qr. 1937 To 2nd Qr. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	15	37	50	$23,774	$5,547	$8,150	$6,492	$3,585	$5,558	$6,396	+ 0.2	-21.5
New England	16	25	3	443	64	231	105	43	57	209	-10.9	- 9.5
Middle Atlantic	17	24	8	1,087	293	389	265	140	175	246	-38.9	-36.8
East North Central	9	16	6	1,165	234	421	330	190	242	418	+ 3.4	- 0.7
West North Central	21	68	13	15,650	3,559	5,506	4,584	2,001	3,808	4,184	+ 7.0	-24.0
South Atlantic	19	28	5	1,146	304	371	239	232	257	293	-15.5	-21.0
West South Central	21	18	6	1,079	430	264	169	212	397	193	- 7.7	-26.9
Pacific	10	26	6	2,347	478	686	599	584	460	618	- 3.8	- 9.9
Other Divisions	11	15	3	861	205	282	211	163	162	235	-21.0	-16.7
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	69	78	168	255,745	60,628	83,814	69,711	41,592	55,259	61,981	- 8.9	-26.1
Middle Atlantic	1/	1/	17	24,316	6,442	8,503	5,519	3,854	5,934	6,827	- 7.9	-19.7
East North Central	--	--	33	60,623	14,235	21,370	14,874	10,144	14,467	15,129	+ 1.6	-29.2
West North Central	--	--	60	88,707	18,020	29,108	28,668	12,917	18,756	24,646	+ 4.1	-15.3
East South Central	--	--	7	16,184	4,560	5,415	3,475	2,734	3,425	2,871	-24.9	-47.0
West South Central	--	--	20	31,831	8,442	7,995	8,990	6,404	5,752	5,518	-31.9	-31.0
Mountain	--	--	11	10,903	3,045	3,281	3,004	1,573	2,047	1,859	-32.8	-43.3
Pacific	--	--	11	8,123	2,198	2,797	1,974	1,160	1,653	1,740	-24.5	-37.8
Other Divisions	--	--	9	15,058	3,692	5,351	3,209	2,806	3,823	3,391	-12.7	-36.6

\+ INCREASE - DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

FARM AND DAIRY MACHINERY AND EQUIPMENT

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTAB-LISH-MENTS INCLUD-ED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB. LISH-MENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	15	37	50	$23,774	$18,961	$16,661	$1,867	$1,494	$3,218	$3,352	$2,958	42.7	25.0	9.0
New England	16	25	3	443	396	300	49	36	70	61	54	47.7	36.1	29.6
Middle Atlantic	17	24	8	1,087	895	762	118	77	138	166	161	42.7	53.2	14.3
East North Central	9	16	6	1,165	1,073	1,013	134	103	180	154	156	15.0	30.1	15.4
West North Central	21	68	13	15,650	11,697	10,359	1,009	800	1,995	2,069	1,765	51.1	26.1	7.4
South Atlantic	19	28	5	1,146	974	932	137	113	241	197	216	23.0	21.2	11.6
West South Central	21	18	6	1,075	914	589	75	57	195	167	168	82.5	31.6	20.4
Pacific	10	26	6	2,347	2,264	2,044	251	227	391	431	364	14.8	10.6	7.4
Other Divisions	11	15	3	861	748	662	94	81	108	87	74	30.1	16.0	45.9
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	67	78	168	255,745	203,080	150,857	15,001	10,447	50,877	45,058	23,748	69.5	43.6	2/
Middle Atlantic	1/	1/	17	24,316	17,028	13,675	1,393	870	3,449	2,890	1,659	91.8	60.1	--
East North Central	--	--	33	60,623	47,882	34,604	3,823	2,214	8,114	6,868	3,613	75.2	45.6	--
West North Central	--	--	60	88,707	71,945	56,301	5,694	4,279	21,711	21,021	11,739	57.6	33.1	--
East South Central	--	--	7	16,184	12,465	8,845	903	563	2,953	2,256	1,077	83.0	60.4	--
West South Central	--	--	20	31,831	26,346	18,812	1,800	1,128	6,959	5,393	2,514	69.2	59.6	--
Mountain	--	--	11	10,903	9,105	5,789	555	432	2,679	2,468	989	88.3	51.6	--
Pacific	--	--	11	8,183	6,480	4,368	506	333	2,155	1,550	1,038	85.4	53.6	--
Other Divisions	--	--	9	15,058	11,829	9,449	825	628	2,857	2,492	1,125	59.4	31.4	--

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

2/ Ratios not given as some large organizations changed inventory date in 1937 from December to October.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

FARM SUPPLIES

Dollar sales of 254 wholesalers of farm supplies -- identical establishments which accounted for 31 percent of the total business of service and limited-function wholesalers in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were 16.1 percent less than for the first quarter, and were 29.0 percent under the sales for the same quarter of 1937. Considering the year 1937 as a whole, sales of the 254 wholesalers were 16.8 percent above 1936 and 36.3 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Of the 254 farm supplies wholesalers included in this Survey, 167 are engaged primarily in selling feeds, 15 in the fertilizer business, 62 specialize in the sale of seeds, and ten handle miscellaneous lines of farm supplies. Dollar sales of each class of establishment, except those specializing in feeds, increased sharply in the first quarter of this year as compared with the fourth quarter of 1937. The business of feed houses declined quarterly since the close of the first half of 1937. All classes of houses except the miscellaneous group experienced a seasonal drop in the second quarter of this year. In addition to the 254 wholesalers, 31 manufacturers' sales branches are included in this Survey. It is interesting to note that the business of manufacturers' sales branches fluctuates more widely than sales of service and limited-function wholesalers.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

Period	Service and limited-function wholesalers selling principally---					Manufacturers' Sales Branches
	Total	Feed	Fertilizer	Seeds	All other	
Number of establishments included	254	167	15	62	10	31
Percent increase (+) or decrease (-) in sales						
1st Qr. to 2nd Qr. 1937	- 4.7	+ 1.3	- 2.0	- 22.7	+ 31.5	+ 77.3
2nd Qr. to 3rd Qr. 1937	- 20.2	- 21.2	- 19.2	- 21.5	- 12.5	- 68.2
3rd Qr. to 4th Qr. 1937	- 10.2	- 5.5	- 4.0	- 13.6	- 39.8	- 27.0
4th Qr. 1937 to 1st Qr. 1938	+ 18.1	- 6.8	+ 16.0	+ 72.9	+ 22.8	+121.9
1st Qr. 1938 to 2nd Qr. 1938	- 16.1	- 2.3	- 19.8	- 42.5	+ 51.3	+ 69.3
1st Qr. 1938 vs. 1st Qr. 1937	- 19.3	- 29.7	- 11.8	- 9.3	- 14.8	- 8.5
2nd Qr. 1938 vs. 2nd Qr. 1937	- 29.0	- 32.2	- 27.8	- 32.6	- 2.1	- 12.6

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared with 1935. Dollar sales of the 254 wholesalers were up 36.3 percent as compared with a 37.7 percent rise in pay roll and 28.7 percent in the value of stocks on hand at the close of the year. Sales of each class of establishment show a corresponding increase, but it is interesting to note that pay roll -- including salaries of executives and officers -- rose more than sales for all classes of houses except the miscellaneous group. Likewise, the value of stocks on hand for fertilizer wholesalers and the miscellaneous group increased considerably more than sales between the close of 1935 and the end of 1937.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below by class of establishment.

	Percent increase 1937 over 1935		
	Sales	Pay roll	Stocks on hand (end of year)
Service and limited-function wholesalers			
Total (254 establishments)	36.3	37.7	28.7
Feed (167 establishments)	35.7	37.7	2.7
Fertilizer (15 establishments)	50.6	99.5	120.9
Seeds (62 establishments)	24.8	25.6	22.4
All other (10 establishments)	50.5	46.0	176.8
Manufacturers' sales branches (31 branches)	14.4	41.6	43.8

These and other facts pertaining to the sales, pay roll and stocks of the 254 wholesalers and the 31 manufacturers' sales branches are given in the two attached tables by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 254 wholesalers and 31 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale farm supplies business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesale houses which came into business subsequent to January 1, 1935 are not canvassed and those ceasing operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale farm supplies business, those with sales for the year 1935 of less than $25,000 were omitted from this Survey.

31 Percent Sample for Wholesalers

Reporting for the Survey is purely on a voluntary basis, hence, not all wholesalers contacted submitted returns. The number is further limited by the omission of those who changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, wholesalers included in this release are limited to those operating as wholesale farm supplies houses for the entire year 1935, and which still operate in a similar manner.

The importance of those included herein is shown by the fact that the 254 wholesalers (service and limited-function wholesalers) represented 18 percent of the number and accounted for 31 percent of the total sales of all farm supplies wholesalers in 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample of the establishments and of sales is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

FARM SUPPLIES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS: ESTABLISHMENTS %	SAMPLE BASED ON 1935 CENSUS: NET SALES * %	NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000): 1937: 1ST QR. Jan. 1 Mar. 31	1937: 2ND QR. April 1 June 30	1937: 3RD QR. July 1 Sept. 30	1937: 4TH QR. Oct. 1 Dec. 31	1938: 1ST QR. Jan. 1 Mar. 31	1938: 2ND QR. April 1 June 30	PERCENT CHANGE: 1ST QR. 1937 TO 1ST QR. 1938	PERCENT CHANGE: 2ND QR. 1937 TO 2ND QR. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	18	31	254	$117,652	$34,643	$33,004	$26,342	$23,663	$27,952	$23,442	-19.3	-29.0
Feed	18	28	169	55,763	15,639	15,845	12,480	11,799	10,992	10,744	-29.7	-32.2
Fertilizer	19	48	15	23,223	6,572	6,442	5,208	5,001	5,799	4,653	-11.8	-27.8
Seeds	18	27	62	30,200	10,397	8,040	6,311	5,452	9,428	5,423	- 9.3	-32.6
All other	20	57	10	8,466	2,035	2,677	2,343	1,411	1,733	2,622	-14.8	- 2.1
Geographic Divisions												
Feed												
New England	56	74	19	5,853	1,396	1,891	1,418	1,148	1,002	1,403	-28.2	-25.8
Middle Atlantic	19	21	26	7,801	2,231	2,184	1,782	1,604	1,611	1,541	-27.8	-29.4
East North Central	16	33	31	11,820	3,375	3,789	2,532	2,124	2,064	2,268	-38.8	-39.2
West North Central	16	29	25	8,049	2,684	2,151	1,426	1,788	1,521	1,313	-43.3	-39.0
South Atlantic	18	27	26	6,048	1,742	1,685	1,275	1,346	1,307	1,251	-25.0	-25.8
East South Central	12	17	13	2,865	803	905	578	579	592	564	-26.3	-37.7
Pacific	16	21	15	8,396	2,050	1,984	2,320	2,042	1,491	1,376	-27.3	-30.6
Other divisions	15	38	12	4,931	1,356	1,316	1,149	1,108	1,804	1,088	-11.3	-21.9
Fertilizer												
Middle Atlantic	21	31	4	4,832	1,632	1,011	722	1,467	1,556	905	- 4.7	-10.5
Pacific	30	51	6	4,424	1,304	1,365	952	733	1,152	772	-16.8	-43.4
Other divisions	13	61	5	13,957	3,556	4,066	3,534	2,801	3,091	2,976	-13.1	-26.8
Seeds												
Middle Atlantic	24	15	12	1,699	451	516	405	327	424	352	- 6.0	-31.8
East North Central	16	35	12	9,598	3,006	2,573	1,977	2,042	3,062	1,444	+ 1.9	-43.9
West North Central	10	26	8	9,254	3,730	2,563	1,733	1,228	3,066	1,678	-17.8	-34.5
South Atlantic	32	53	12	4,795	1,472	1,463	1,123	737	1,344	1,175	- 8.7	-19.7
East South Central	36	41	5	2,094	747	400	585	362	560	333	-25.0	-16.8
Other divisions	14	11	13	2,760	991	525	488	756	972	441	- 1.9	-16.0
MANUFACTURERS' SALES BRANCHES												
UNITED STATES	42	50	31	18,047	4,812	8,534	2,717	1,984	4,403	7,455	- 8.5	-12.6
Feed	33	40	10	1,490	413	408	351	318	312	296	-24.5	-27.5
Fertilizer	54	51	21	16,557	4,399	8,126	2,366	1,666	4,091	7,159	- 7.0	-11.9

+ INCREASE - DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
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PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

FARM SUPPLIES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	18	31	254	$117,658	$100,707	$86,339	$6,737	$4,893	$11,174	$10,471	$8,682	36.3	37.7	28.7
Feed	18	28	167	55,763	49,317	41,101	2,807	2,038	3,736	3,460	3,150	35.7	37.7	18.7
Fertilizer	19	48	13	23,823	19,103	15,418	810	406	1,710	894	774	50.6	99.5	120.9
Seeds	18	27	62	30,200	25,645	24,194	2,809	2,235	5,500	5,730	4,495	24.8	25.6	22.4
All other	20	57	10	8,466	6,647	5,626	311	213	728	397	263	50.5	46.0	176.8
Geographic Divisions														
Feed														
New England	56	74	19	5,853	5,285	4,669	322	256	300	308	225	25.4	25.8	33.3
Middle Atlantic	19	21	26	7,801	7,004	6,494	772	628	331	336	350	31.0	19.3	- 5.4
East North Central	16	33	31	11,820	10,650	8,221	610	432	685	835	688	43.8	41.2	0.4
West North Central	16	29	25	8,049	7,547	5,554	352	231	447	440	315	44.9	52.4	41.9
South Atlantic	18	27	26	5,048	5,343	4,931	359	287	557	537	435	22.7	25.1	28.0
West South Central	12	17	13	2,865	2,532	2,635	173	124	122	153	358	8.7	39.5	- 65.9
Pacific	16	21	15	8,396	6,598	5,433	479	326	507	598	493	54.5	46.9	2.8
Other divisions	15	38	12	4,931	4,388	3,704	230	154	287	328	292	33.1	49.4	- 1.7
Fertilizer														
Middle Atlantic	21	31	4	4,832	3,569	3,594	195	108	424	241	159	34.4	80.6	166.7
Pacific	30	51	6	4,434	4,162	3,088	250	135	462	375	303	43.6	85.2	52.5
Other divisions	13	61	5	13,957	11,372	8,736	365	163	824	268	312	59.8	123.9	164.1
Seeds														
Middle Atlant'	24	15	12	1,699	1,380	1,260	222	224	486	466	375	34.8	- 0.9	29.6
East North Ce tral	16	35	12	9,598	7,856	7,345	760	568	1,095	1,151	836	30.7	33.8	31.0
West North Central	10	25	8	9,254	7,915	8,233	1,151	953	2,317	2,420	1,819	12.4	20.4	27.4
South Atlantic	38	53	12	4,795	4,152	3,599	357	251	677	786	457	33.2	42.2	48.0
East South Central	36	41	5	2,094	1,860	1,576	133	92	397	378	385	32.9	44.6	3.1
Other divisions	14	11	13	2,760	2,482	2,181	186	168	528	529	613	26.5	10.7	- 13.9
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	42	50	31	18,047	15,695	15,779	1,419	1,002	1,163	914	809	14.4	41.6	43.8
Feed	33	40	10	1,490	1,450	1,172	72	62	91	111	81	27.1	16.1	12.3
Fertilizer	54	51	21	16,557	14,245	14,607	1,347	940	1,072	803	728	13.3	43.3	47.3

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38

Wholesale Distribution

FRUITS AND VEGETABLES (fresh)

Dollar sales of 904 wholesalers of fruits and vegetables -- identical establishments accounting for 30 percent of the sales for all wholesalers specializing in this business during 1935, the latest year covered by a regular business census -- increased 29.8 percent in the second quarter over the first quarter of 1938, but were 13.8 percent below sales for the second quarter of 1937. Considering 1937 as a whole, their business was 5.2 percent above 1936 and 23.7 percent higher than for the year 1935.

In addition to the wholesalers, 101 commission merchants are included in this Survey. Dollar sales for the commission merchants increased 26.3 percent in the second quarter over the first quarter of this year, and were also 13.6 percent less than sales for the second quarter of 1937. Their total 1937 sales were 4.6 percent above 1936 and 10.7 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Commission Merchants
Number of establishments included	904	101
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 27.8	+ 19.6
2nd Qr. to 3rd Qr. 1937	- 17.2	- 29.4
3rd Qr. to 4th Qr. 1937	- 12.2	+ 4.2
4th Qr. 1937 to 1st Qr. 1938	- 8.7	- 7.0
1st Qr. 1938 to 2nd Qr. 1938	+ 29.8	+ 26.3
1st Qr. 1938 vs. 1st Qr. 1937	- 15.2	- 18.1
2nd Qr. 1938 ve. 2nd Qr. 1937	- 13.8	- 13.6

1937 Compared with 1935

Increases are noted in sales, pay roll and stocks for 1937 compared with 1935. Dollar sales of the 904 wholesalers were up 23.7 percent as compared with a 23.6 percent increase in pay roll, and 11.5 percent rise in stocks on hand at the close of the year. For the 101 commission merchants sales increased 10.7 percent; pay roll rose 13.5 percent, and stocks increased only 5.7 percent.

	Percentage increases, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
904 Service and limited-function wholesalers	23.7	23.6	11.5
101 Commission merchants	10.7	13.5	5.7

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2, by geographic divisions and for the 13 cities with a population of more than 500,000.

SCOPE OF SURVEY

The data contained in this report were supplied by 904 wholesalers (title taking merchants) and 101 commission merchants which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale fruit and vegetable business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers and commission merchants that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale fruit and vegetable business, those with sales for the year 1935 of less than $25,000 were also omitted.

30% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale fruit and vegetable houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 904 wholesalers represented 15 percent of the number and accounted for 30 percent of the business for all wholesalers in 1935, and the 101 commission merchants represented 8 percent of the number and accounted for 10 percent of the total sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

FRUITS AND VEGETABLES (fresh)

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS BY GEOGRAPHIC DIVISIONS AND THE 13 CITIES WITH POPULATION OF MORE THAN 500,000

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTAB-LISH-MENTS INCLUD-ED IN 1937-38 SURVEY	NET SALES YEAR 1937 ($000)	NET SALES BY QUARTERS ($000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTAB-LISH-MENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	15	30	904	$356,825	$83,683	$106,909	$88,506	$77,727	$70,959	$92,129	-15.2	-13.8
New England	18	34	89	35,717	7,849	11,159	9,423	7,286	6,602	9,796	-15.9	-12.2
Middle Atlantic	12	24	207	90,244	20,655	26,948	22,494	19,947	16,006	22,933	-13.7	-14.9
East North Central	17	33	199	82,179	19,798	24,854	19,544	17,983	16,734	21,662	-15.5	-12.8
West North Central	11	17	57	22,217	5,385	6,749	5,554	4,529	4,588	5,510	-14.8	-18.4
South Atlantic	12	27	77	23,871	5,610	6,772	5,796	5,693	4,826	5,578	-14.0	-17.6
East South Central	14	33	32	11,180	2,580	3,231	2,525	2,844	2,662	2,896	+ 3.2	-10.4
West South Central	12	24	42	15,104	3,856	4,899	3,451	3,498	3,569	3,657	- 7.4	-14.9
Mountain	21	42	47	13,253	2,831	3,922	3,820	2,680	2,440	3,396	-13.8	-13.4
Pacific	18	50	154	63,060	14,919	16,975	13,899	13,267	11,532	16,541	-22.7	-12.8
13 cities over 500,000 population	14	30	306	166,761	39,512	50,386	40,444	36,417	33,053	43,211	-16.3	-14.2
Boston	17	39	24	17,824	3,887	5,677	4,812	3,448	3,378	5,030	-13.1	-11.4
New York City	12	25	79	43,916	10,827	12,763	10,610	9,716	9,453	11,072	-12.7	-13.3
Philadelphia	10	18	21	6,972	1,507	2,165	1,754	1,546	1,426	1,868	- 5.4	-13.7
Pittsburgh	16	21	18	10,995	2,283	3,564	2,929	2,409	1,886	2,740	-17.3	-16.6
Buffalo	17	36	8	4,286	1,023	1,223	1,054	986	804	968	-21.4	-20.9
Chicago	14	29	32	22,203	5,516	6,501	4,998	5,188	4,570	5,578	-17.2	-14.2
Cleveland	26	46	17	9,879	2,279	3,117	2,358	2,125	2,007	2,578	-11.9	-17.4
Detroit	16	29	14	7,799	1,856	2,274	1,830	1,839	1,543	2,051	-16.9	- 9.8
Milwaukee	22	29	10	2,713	638	848	665	562	542	750	-15.0	-10.9
St. Louis	13	16	12	5,165	1,425	1,617	1,179	944	1,057	1,275	-25.8	-21.2
Baltimore	11	27	10	4,051	833	1,296	1,073	849	661	1,039	-20.6	-19.8
Los Angeles	11	42	40	16,800	3,914	5,258	4,089	3,539	3,261	4,875	-16.2	- 7.3
San Francisco	25	56	21	14,218	3,514	4,291	3,096	3,317	2,435	3,869	-30.7	-21.0
COMMISSION MERCHANTS												
UNITED STATES	8	10	101	67,733	17,275	20,669	14,587	15,202	14,145	17,865	-18.1	-13.6
New England	1/	1/	7	9,256	2,357	2,963	1,767	2,159	1,898	2,574	-19.5	-13.1
Middle Atlantic	--	--	33	24,607	6,861	7,884	4,403	5,459	5,982	6,524	-13.1	-17.3
East North Central	--	--	25	19,159	5,028	5,880	4,150	4,111	3,966	5,219	-21.1	-11.2
South Atlantic	--	--	8	4,397	894	1,135	1,220	1,098	670	1,004	-24.2	-11.5
Pacific	--	--	17	9,024	1,777	2,442	2,688	2,117	1,371	2,223	-22.8	- 9.0
Other divisions	--	--	6	1,270	348	365	279	278	258	321	-25.9	-12.1

\+ INCREASE – DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

FRUITS AND VEGETABLES (fresh)

TABLE 2.-SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS AND THE 13 CITIES WITH

POPULATION OF MORE THAN 500,000

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (000)			PAY ROLL** (000)		STOCKS ON HAND END OF YEAR (000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	15	30	904	$356,685	$339,153	$288,470	$17,644	$14,280	$7,091	$7,539	$6,389	23.7	23.6	11.5
New England	18	34	89	35,717	32,240	28,649	1,715	1,458	315	326	307	24.7	17.6	2.6
Middle Atlantic	13	24	207	90,244	85,234	73,958	3,881	3,082	2,330	2,513	2,053	22.0	25.9	13.5
East North Central	17	35	199	82,179	78,908	63,968	3,824	2,990	1,542	1,376	1,041	28.5	28.0	28.9
West North Central	11	17	57	22,217	22,325	18,396	978	803	476	515	318	20.8	21.8	49.7
South Atlantic	12	27	77	23,871	23,002	18,291	1,295	1,085	519	564	486	30.5	28.6	6.8
East South Central	14	33	32	11,180	10,371	8,906	594	523	225	227	216	25.5	13.6	4.2
West South Central	12	24	42	15,104	14,228	11,800	853	706	243	267	241	28.0	20.8	0.8
Mountain	21	42	47	13,253	12,473	10,797	744	655	463	403	379	22.9	13.6	22.2
Pacific	18	50	154	63,060	60,270	53,715	3,660	2,978	1,178	1,348	1,318	17.4	22.9	-10.6
13 cities over 500,000 population	14	30	306	166,761	159,430	134,723	6,957	5,580	2,831	2,909	2,539	23.8	24.7	11.5
Boston	17	39	24	17,824	16,668	13,762	698	584	91	89	71	29.5	19.5	28.2
New York City	12	25	79	43,916	40,675	36,518	2,136	1,701	1,702	1,691	1,566	20.3	25.6	8.7
Philadelphia	10	18	21	6,972	7,315	5,561	260	200	46	45	53	25.4	30.0	-13.2
Pittsburgh	16	21	16	10,995	10,337	8,116	372	233	150	77	64	35.5	36.2	134.4
Buffalo	17	36	8	4,226	4,114	3,769	102	78	45	75	79	12.1	30.8	-43.0
Chicago	14	29	32	22,203	21,865	16,364	946	777	268	220	195	35.9	21.8	37.4
Cleveland	26	46	17	9,879	9,255	7,115	286	222	84	63	69	38.8	28.8	21.7
Detroit	16	29	14	7,799	7,124	5,910	204	162	33	41	16	32.0	25.9	106.3
Milwaukee	22	29	10	2,713	2,664	2,378	120	96	27	30	30	14.1	25.0	-10.0
St. Louis	13	18	12	5,165	5,291	4,190	233	201	60	64	44	23.3	15.9	36.4
Baltimore	11	27	10	4,051	3,985	2,625	127	76	9	11	8	54.3	67.1	12.5
Los Angeles	11	42	40	16,800	15,835	14,250	837	638	167	156	86	17.9	31.2	94.2
San Francisco	25	56	21	14,218	14,164	12,167	686	612	149	146	257	16.9	12.1	-42.0
COMMISSION MERCHANTS														
UNITED STATES	8	10	101	67,733	64,779	61,192	2,435	2,146	371	356	351	10.7	13.5	5.7
New England	1/	1/	7	9,266	9,017	9,093	326	273	20	10	36	2.1	19.4	-44.4
Middle Atlantic	--	--	39	24,607	24,453	24,850	771	727	132	145	127	1.5	3.3	3.9
East North Central	--	--	25	19,169	17,572	14,709	619	480	143	130	116	30.3	29.0	23.3
South Atlantic	--	--	8	4,297	3,891	3,388	152	134	23	22	18	29.6	13.4	27.8
Pacific	--	--	17	9,084	9,119	8,636	547	492	48	45	45	4.5	11.2	6.7
Other divisions	--	--	6	1,270	1,547	1,134	40	40	5	4	9	12.0	0.0	-44.4

— DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38

Wholesale Distribution

FURNITURE AND HOUSE FURNISHINGS

Dollar sales of 400 wholesalers of furniture and house furnishings -- identical establishments which accounted for 41 percent of the total business of service and limited-function wholesalers in 1935, the latest year covered by a regular business census -- increased 6.3 percent in the second quarter over the first quarter of 1938, but were 26.8 percent less than sales for the second quarter of 1937. Considering the year 1937 as a whole, sales of the 400 wholesalers were 8.8 percent above 1936 and 37.4 percent higher than 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Of the 400 furniture and house furnishings wholesalers included in this Survey, 119 are engaged primarily in selling floor coverings, 67 in the china and glassware business, 62 specialize in the sale of household and office furniture, while 20 sell musical instruments and 132 handle house furnishings except as specified. Dollar sales of floor coverings wholesalers and of household and office furniture houses showed a decided increase in the second quarter over the first quarter of this year, while sales for china and glassware, musical instruments and furniture wholesalers declined. The largest decrease (16.5%) appears for the musical instrument business. The business of each class of wholesaler was substantially less in the second quarter of this year than for the corresponding period of 1937.

In addition to the 400 wholesalers, 166 manufacturers' sales branches are included in this Survey. It is interesting to note that the business of these branches follows the same trend as for wholesalers, but with more pronounced fluctuations.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers selling principally---						Manufacturers' Sales Branches
	Total	China and glassware	Floor coverings	Furniture (household and office)	House furnishings (N.E.C.)	Musical instruments	
Number of establishments included	400	67	119	62	132	20	166
Percent increase (+) or decrease (-) in sales							
1st Qr. to 2nd Qr. 1937	+ 15.0	+ 10.1	+ 24.6	+ 48.5	- 6.0	- 3.9	+ 18.7
2nd Qr. to 3rd Qr. 1937	- 3.0	+ 11.9	- 8.4	- 18.8	+ 7.5	+ 6.6	- 10.0
3rd Qr. to 4th Qr. 1937	- 2.6	- 0.2	- 7.9	+ 7.3	- 2.0	+ 18.0	- 18.1
4th Qr. 1937 to 1st Qr. 1938	- 27.0	- 31.7	- 27.1	- 38.1	- 21.9	- 15.5	- 13.5
1st Qr. 1938 to 2nd Qr. 1938	+ 6.3	- 3.3	+ 15.5	+ 20.9	- 3.8	- 16.5	+ 5.7
1st Qr. 1938 vs. 1st Qr. 1937	- 20.7	- 16.0	- 23.4	- 19.9	- 22.6	+ 2.2	- 24.3
2nd Qr. 1938 vs. 2nd Qr. 1937	- 26.8	- 26.2	- 29.0	- 34.8	- 20.8	- 11.2	- 32.6

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared to 1935. Dollar sales of the 400 wholesalers were up 37.4 percent as compared with a 39.3 percent rise in pay

roll and 26.3 percent increase in stocks on hand at the close of the year. The 166 manufacturers' sales branches show a 28.7 percent increase in sales, 43.6 percent rise in pay roll, and 21.1 percent increase in stocks.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

Kind of business	Percentage increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (400 establishments)	37.4	39.3	26.3
China, glassware and crockery (67 establishments)	27.5	31.7	28.0
Floor coverings (119 establishments)	32.8	42.1	24.5
Furniture (household and office) (62 establishments)	63.7	51.8	52.0
House furnishings (except as specified) (132 establishments)	39.3	32.1	23.2
Musical instruments and sheet music (20 establishments)	51.1	45.1	14.6
Manufacturers' sales branches (166 establishments)	28.7	43.6	21.1

These and other facts pertaining to sales, pay roll and stocks of the establishments included herein are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 400 wholesalers and 166 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale furniture and house furnishings business. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers who came into business subsequent to January 1, 1935 were not canvassed and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale furniture and house furnishings business, those with sales for the year 1935 of less than $25,000 were also omitted.

41% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all wholesalers contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale furniture and house furnishing houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 400 wholesalers (service and limited-function) represented 20 percent of the number and accounted for 41 percent of the total sales of all furniture and house furnishing wholesalers in 1935. For convenience in evaluating the Survey, the percent sample of establishments and of sales is given for each classification, by geographic divisions, in the two attached tables.

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This is the latest report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 WHOLESALE DISTRIBUTION

FURNITURE AND HOUSE FURNISHINGS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET * SALES YEAR 1937	NET SALES BY QUARTERS (000 omitted)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	NET SALES %		(000 omitted)	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	20	41	400	$137,620	$31,629	$36,576	$35,272	$34,343	$25,070	$26,643	-20.7	-26.8
China, glassware and crockery	21	40	67	17,264	3,765	4,166	4,662	4,651	3,179	3,073	-16.0	-26.2
Floor coverings	33	53	119	63,256	14,252	17,760	16,263	14,981	10,915	12,612	-23.4	-29.0
Furniture (household and office)	17	24	62	15,060	3,021	4,485	3,644	3,910	2,420	2,926	-19.9	-34.8
House furnishings (except as specified)	17	37	132	35,646	9,047	8,500	9,141	8,958	6,998	6,731	-22.6	-20.8
Musical instruments and sheet music	18	51	20	6,394	1,524	1,465	1,562	1,845	1,558	1,301	+ 2.2	-11.2
Geographic Divisions												
China, glassware and crockery												
Middle Atlantic	27	49	44	12,290	2,770	2,940	3,314	3,266	2,365	2,107	-14.6	-28.3
East North Central	13	23	6	1,590	358	434	389	407	238	595	-33.5	- 9.4
Pacific	17	40	5	1,018	199	250	272	297	175	160	-12.1	-36.0
Other divisions	16	29	10	2,366	438	540	697	681	401	411	-12.4	-23.9
Floor coverings												
New England	24	46	7	3,576	762	1,029	831	756	546	723	-28.3	-29.7
Middle Atlantic	32	55	66	27,715	6,265	6,859	7,291	7,300	4,665	4,664	-25.6	-32.0
East North Central	26	39	14	8,572	2,091	2,930	2,009	1,542	1,368	1,871	-33.6	-36.1
West North Central	37	85	6	7,985	1,730	2,484	2,033	1,738	1,502	2,140	-13.2	-13.8
Pacific	22	35	7	6,888	1,413	1,749	1,641	1,419	1,151	1,305	-20.0	-25.4
Other divisions	57	71	17	9,384	1,991	2,709	2,458	2,225	1,665	1,909	-15.4	-29.5
Furniture (household and office)												
Middle Atlantic	16	24	25	4,778	955	1,215	1,089	1,521	769	917	-17.4	-24.4
East North Central	16	36	15	4,658	907	1,574	1,121	1,056	681	978	-24.9	-37.8
West North Central	18	18	6	1,572	280	388	355	349	269	324	- 3.9	-16.5
South Atlantic	28	30	5	2,052	422	715	506	591	259	304	-38.6	-57.4
Pacific	11	25	6	894	196	246	218	234	199	223	+ 1.5	- 9.4
Other divisions	15	14	7	1,326	261	351	355	359	225	280	-14.6	-20.2
House furnishings (except as specified)												
New England	12	43	5	3,456	793	1,090	863	710	521	644	-34.3	-32.6
Middle Atlantic	20	39	90	25,205	6,822	5,690	6,553	6,440	5,005	4,437	-23.3	-22.0
East North Central	13	36	14	3,597	937	865	878	917	773	718	-17.5	-17.7
West North Central	18	36	6	759	194	160	152	253	175	170	- 9.8	-10.6
Pacific	15	20	15	1,556	359	413	410	374	295	361	-17.8	-12.6
Other divisions	7	30	4	1,073	242	282	285	264	231	234	- 4.5	-17.0
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	66	72	166	72,722	17,600	20,896	18,814	15,412	13,330	14,091	-24.3	-32.6
Floor coverings	68	73	34	28,947	7,696	8,687	7,063	5,511	5,316	4,918	-30.9	-43.2
Furniture (household and office)	78	84	94	35,052	6,996	8,824	8,796	7,436	6,009	6,505	-14.1	-26.3
House furnishings (except as specified)	50	51	36	10,991	2,724	3,225	2,800	2,242	1,880	2,538	-31.0	- 4.3
All other	29	83	2	732	184	190	135	225	125	132	-32.1	-30.5
Furniture and house furnishings												
New England	81	92	13	5,257	1,294	1,475	1,275	1,225	897	1,002	-30.7	-32.0
Middle Atlantic	49	50	33	18,288	4,417	5,176	4,578	4,117	3,337	3,519	-24.5	-32.0
East North Central	63	77	36	19,937	5,009	6,319	4,940	3,669	3,830	3,446	-23.5	-45.5
West North Central	65	81	17	6,215	1,508	1,913	1,591	1,205	1,219	1,197	-19.2	-37.0
South Atlantic	90	94	19	7,300	1,673	1,798	2,138	1,761	1,786	1,758	+ 6.8	+ 1.7
West South Central	87	93	13	5,884	918	950	1,057	955	785	759	-15.9	-25.2
Pacific	69	95	19	8,911	2,046	2,499	2,451	1,915	1,542	1,639	-24.6	-34.4
Other divisions	88	62	14	2,920	741	836	774	567	534	591	-27.9	-29.5

+ INCREASE – DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

FURNITURE AND HOUSE FURNISHINGS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		No. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)			STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	80	41	400	$137,680	$126,317	$100,181	$12,453	$9,939	$86,445	$23,305	$20,932	37.4	39.3	26.3
China, glassware and crockery	21	40	67	17,284	15,905	13,543	2,314	1,737	3,309	2,368	2,283	27.5	31.7	28.0
Floor coverings	33	33	119	63,256	60,047	47,615	4,490	3,160	13,811	12,313	11,093	32.8	42.1	24.5
Furniture (household & office)	17	24	62	15,060	12,698	9,197	1,767	1,164	8,456	2,088	1,617	63.7	51.8	52.0
House furnishings (except as specified)	17	37	132	35,646	32,525	25,593	2,677	2,086	5,813	5,390	4,719	39.3	32.1	23.2
Musical instruments and sheet music	18	31	20	6,394	5,342	4,231	1,207	838	1,052	946	918	51.1	45.1	14.6
Geographic Divisions														
China, glassware and crockery														
Middle Atlantic	27	49	44	12,890	11,383	9,807	1,560	1,213	2,802	1,645	1,747	25.3	28.6	25.0
East North Central	13	23	8	1,580	1,327	1,280	285	167	269	231	181	30.3	70.7	78.1
Pacific	17	40	3	1,018	1,012	758	90	78	145	114	126	29.4	15.4	15.1
Other divisions	16	29	10	2,366	2,183	1,764	379	299	693	377	561	34.1	26.8	23.5
Floor coverings														
New England	24	46	7	3,378	3,238	2,338	210	188	576	714	489	30.4	15.4	17.8
Middle Atlantic	32	55	66	27,715	27,390	23,070	2,071	1,486	6,631	6,366	3,809	25.6	39.4	14.2
East North Central	36	39	14	8,578	7,703	5,921	401	297	1,729	1,118	1,111	44.8	35.7	35.6
West North Central	57	85	8	7,983	7,508	5,589	771	536	1,747	1,491	1,345	42.8	43.8	29.6
Pacific	22	35	7	6,222	5,713	3,909	400	344	1,233	1,070	847	59.2	53.9	45.6
Other divisions	37	71	17	9,304	8,421	6,352	532	415	1,095	1,332	1,489	46.3	52.3	27.3
Furniture (household & office)														
Middle Atlantic	16	24	23	4,778	4,230	3,319	627	437	925	767	642	44.0	43.5	43.4
East North Central	16	36	13	4,659	3,532	2,843	435	268	497	368	230	107.7	62.3	116.1
West North Central	33	18	6	1,372	1,296	937	263	164	363	334	245	46.4	60.4	48.2
South Atlantic	28	30	3	2,032	1,702	1,243	189	128	273	264	248	63.5	47.7	10.1
Pacific	11	33	6	894	746	460	113	66	136	132	64	94.3	71.2	112.5
Other divisions	13	14	7	1,326	1,170	995	140	101	254	229	185	33.3	38.6	48.7
House furnishings (except as specified)														
New England	12	43	5	3,436	3,430	2,748	346	269	736	714	660	25.8	28.6	11.8
Middle Atlantic	20	39	30	13,805	12,940	11,287	1,731	1,313	4,071	3,739	3,232	41.1	33.5	26.0
East North Central	13	36	14	3,597	3,068	2,418	231	188	331	314	269	49.1	17.6	30.3
South Atlantic	18	32	5	759	746	569	50	34	195	178	136	13.3	47.1	25.0
Pacific	15	20	13	1,304	1,099	1,105	167	109	259	233	219	40.8	53.8	17.8
Other divisions	7	30	4	1,073	948	804	137	111	202	196	183	33.5	23.4	10.4
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	66	72	166	72,722	67,284	56,519	4,514	3,144	6,239	5,467	5,153	28.7	43.6	21.1
Floor coverings	68	73	34	28,947	28,077	20,690	1,114	888	3,851	2,952	3,152	39.9	34.5	22.2
Furniture (household & office)	78	84	94	32,058	28,337	27,846	2,497	1,603	1,746	1,786	1,818	17.6	53.7	43.3
House furnishings (except as specified)	50	51	36	10,991	10,173	8,052	751	563	632	717	772	36.3	28.8	-18.1
All other	89	89	8	732	697	931	188	188	10	12	11	37.9	48.2	- 9.1
Furniture and house furnishings														
New England	81	92	13	5,267	4,784	3,905	348	259	246	248	202	38.4	34.4	21.8
Middle Atlantic	49	50	33	18,288	16,438	14,458	1,397	983	1,921	1,597	1,828	26.5	33.0	5.1
East North Central	63	77	38	19,937	18,296	14,702	1,247	789	1,705	1,372	1,501	33.6	36.0	13.6
West North Central	63	81	17	6,215	5,180	5,832	348	270	435	475	455	18.8	28.9	- 5.3
South Atlantic	90	94	19	7,300	6,883	5,276	301	263	335	313	375	33.5	14.5	-10.5
West South Central	97	93	13	3,884	3,660	3,017	193	148	208	257	174	28.7	31.8	19.1
Pacific	68	83	19	8,911	8,863	7,965	566	538	1,092	787	1,003	49.4	67.5	8.8
Other divisions	88	82	14	2,980	2,835	2,871	138	94	299	246	210	28.6	40.4	42.4

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in the survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

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PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

GROCERIES (FULL-LINE)

Net sales of 957 full-line grocery wholesalers -- identical establishments representing 25 percent of the number and accounting for 31 percent of the sales of all full-line houses in 1935 -- increased 3.4 percent in the second quarter over the first quarter of 1938. Dollar sales were off 10.0 percent, however, when the second quarter of 1938 is compared with the second quarter of 1937. For the year 1937 sales of the 957 houses were 17.5 percent higher than for the year 1935, the latest covered by a regular business census. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in another report issued in connection with the Census Survey of Business for 1937-38.

Full-line grocery wholesalers are divided, for census purposes, into wholesale merchants or service wholesalers; voluntary group wholesalers; cash-and-carry depots and retailer-cooperative warehouses. Based upon information furnished by those reporting for this Survey, dollar sales for each class of establishment reached their high, for the year 1937 and the first half of 1938, in the third quarter of last year. From the high, business declined during the fourth quarter of 1937 and the first quarter of 1938, with a mild upturn for each classification except retailer-cooperatives in the second quarter of this year. Wholesale merchants or service wholesalers show the largest drop (11.4%) when the second quarter of 1938 is compared with the second quarter of 1937, while the smallest decline (3.3%) appears for retailer-cooperative warehouses.

COMPARISON OF SALES BY QUARTERS

The percentage change in net sales (without adjustments for seasonal variation) is given below, by quarters for the year 1937 and the first half of 1938, for each of the four classes of wholesalers.

Period	Total	Wholesale merchants	Voluntary group wholesalers	Cash-and-carry depots	Retailer-cooperative warehouses
Number of establishments reporting	957	647	146	122	42
Percent increase (+) or decrease (-) in sales					
1st Qr. to 2nd Qr. 1937	+ 5.5	+ 6.5	+ 5.3	+ 6.4	+ 0.2
2nd Qr. to 3rd Qr. 1937	+ 6.5	+ 5.8	+ 8.0	+ 5.4	+ 7.7
3rd Qr. to 4th Qr. 1937	- 8.7	- 9.7	- 8.1	- 12.7	- 2.5
4th Qr. 1937 to 1st Qr. 1938	- 10.6	- 10.9	- 11.8	- 5.7	- 7.0
1st Qr. 1938 to 2nd Qr. 1938	+ 3.4	+ 4.1	+ 3.6	+ 2.5	- 1.0
1st Qr. 1937 to 1st Qr. 1938	- 8.2	- 9.4	- 7.8	- 7.6	- 2.2
2nd Qr. 1937 to 2nd Qr. 1938	- 10.0	- 11.4	- 9.3	- 11.0	- 3.3
Year 1935 to year 1937	+ 17.5	+ 18.0	+ 12.8	+ 22.5	+ 25.5

Retailer-cooperative warehouses show the largest gain, 25.5 percent, in 1937 over 1935; followed in order by cash-and-carry depots, 22.5 percent; wholesale merchants, 18.0 percent; and voluntary group wholesalers with a gain of 12.8 percent.

Pay Roll Increases

A significant trend in the full-line grocery trade is noted when pay roll (including salaries of executives and corporation officers) is compared with sales. Pay roll of the 957 reporting establishments amounted to $5.50 for each $100 of sales in 1935. Between 1935 and 1937

both sales and salaries and wages rose 17.5 percent with the result that the ratio remained the same - $5.50 per $100 of sales. During the first two quarters of 1938, however, salaries and wages failed to decline with sales volume, hence, pay roll rose to $5.70 per $100 of sales. Considered by type of wholesaler, pay roll for wholesale merchants rose from $5.50 per $100 of sales in 1935 to $5.60 in the second quarter of this year; for voluntary group wholesalers the increase was from $6.60 per $100 to $7.10; for cash-and-carry depots, from $2.30 to $2.50; and for retailer-cooperative warehouses, from $3.00 to $3.30.

Pay roll as a percent of net sales -- 1935, 1937, and the first two quarters of 1938 -- is given below:

	1938		1937	1935
	2nd Qr.	1st Qr.		
Total (957 establishments)	5.7	5.7	5.5	5.5
Wholesale merchants (647 establishments)	5.6	5.7	5.5	5.5
Voluntary group wholesalers (146 establishments)	7.1	7.3	6.8	6.6
Cash-and-carry depots (122 establishments)	2.5	2.6	2.1	2.3
Retailer-cooperative warehouses (42 establishments)	3.3	3.1	3.1	3.0

Many other facts pertaining to the full-line grocery wholesalers reporting for this Survey are given in the attached tables by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 957 full-line grocery establishments which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale grocery trade. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935, are not canvassed and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the trade, those with sales for the year 1935 of less than $25,000 were also omitted from the mailing list.

31 Percent Sample

Reporting for this Survey is purely on a voluntary basis; hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as full-line wholesale grocery establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 957 establishments represented 25 percent of the number and accounted for 31 percent of the total sales of all full-line grocery wholesalers in the country in 1935. For convenience in evaluating their importance the percent sample, both of establishments and sales, is given in the first two columns of Tables 1 and 2 by geographic divisions.

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This is the sixth wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

GROCERIES (full-line)

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS DIVISION	SAMPLE BASED ON 1935 CENSUS: ESTABLISHMENTS %	SAMPLE BASED ON 1935 CENSUS: * NET SALES %	NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000): 1937 1ST QR. Jan. 1 Mar. 31	1937 2ND QR. April 1 June 30	1937 3RD QR. July 1 Sept. 30	1937 4TH QR. Oct. 1 Dec. 31	1938 1ST QR. Jan. 1 Mar. 31	1938 2ND QR. April 1 June 30	PERCENT CHANGE: 1ST QR. 1937 TO 1ST QR. 1938	PERCENT CHANGE: 2ND QR. 1937 TO 2ND QR. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	25	31	957	$708,216	$168,360	$177,667	$189,289	$172,900	$154,639	$159,840	- 8.2	-10.0
Wholesale merchants	--	--	647	429,876	102,143	108,776	115,070	103,887	92,572	96,382	- 9.4	-11.4
Voluntary group wholesalers	--	--	146	185,357	43,755	46,093	49,780	45,729	40,351	41,802	- 7.8	- 9.3
Cash-and-carry depots	--	--	122	19,878	4,773	5,079	5,353	4,673	4,409	4,520	- 7.6	-11.0
Retailer-cooperative warehouses	--	--	42	73,105	17,689	17,719	19,086	18,611	17,307	17,136	- 2.2	- 3.3
Geographic Divisions												
New England	23	18	40	20,469	4,728	5,199	5,480	5,062	4,579	5,059	- 3.2	- 2.7
Middle Atlantic	34	39	150	154,515	36,901	39,235	39,954	38,425	34,522	34,418	- 6.4	-12.3
East North Central	21	35	143	142,382	33,062	34,887	38,088	36,345	30,143	31,385	- 8.8	-10.0
West North Central	33	35	125	102,863	24,233	25,659	28,960	24,011	21,728	23,973	-10.3	- 6.6
South Atlantic	19	23	126	60,280	14,732	15,230	15,662	14,656	13,492	13,486	- 8.4	-11.5
East South Central	18	19	75	37,339	9,239	9,512	9,920	8,668	7,993	8,102	-13.5	-14.8
West South Central	25	29	164	90,952	22,680	23,128	23,654	21,490	20,929	20,822	- 7.7	-10.0
Mountain	28	39	49	37,120	7,780	9,334	10,477	9,529	6,914	8,062	-11.1	-13.6
Pacific	33	29	85	62,296	15,005	15,483	17,094	14,714	14,339	14,533	- 4.4	- 6.1

- DECREASE

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

States Comprising Geographic Divisions:

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PACIFIC - (Calif., Oreg., Wash.)

GROCERIES (full-line)

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB-LISH-MENTS REPORT-ING 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB-LISH-MENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	25	31	957	$708,216	$663,384	$602,977	$38,801	$33,014	$92,272	$92,459	$78,627	17.5	17.5	17.4
Wholesale merchants	--	--	647	429,876	403,294	364,234	23,482	20,003	56,654	56,934	48,083	18.0	17.4	17.8
Voluntary group wholesalers	--	--	146	185,357	175,112	164,267	12,617	10,871	26,575	26,744	23,437	12.8	16.1	13.4
Cash-and-carry depots	--	--	122	19,878	19,356	16,233	414	372	1,315	1,318	1,150	22.5	11.3	14.3
Retailer-cooperative warehouses	--	--	42	73,105	65,622	58,243	2,288	1,768	7,728	7,463	5,957	25.5	29.4	29.7
Geographic Divisions														
New England	23	18	40	20,469	19,183	17,541	1,243	1,075	2,814	2,700	2,460	16.7	15.6	14.4
Middle Atlantic	34	39	150	154,515	141,586	132,635	9,108	7,492	19,905	19,881	17,656	16.5	21.6	12.7
East North Central	21	35	143	142,382	133,035	124,406	10,208	8,825	19,400	19,170	16,368	14.4	15.7	18.5
West North Central	33	35	125	102,863	99,558	87,018	5,245	4,425	13,561	14,045	11,288	18.2	18.5	20.1
South Atlantic	19	23	126	60,280	57,037	53,076	2,789	2,454	6,983	6,960	6,022	13.6	13.7	16.0
East South Central	18	19	75	37,339	35,204	30,318	1,703	1,470	4,530	4,813	3,811	23.2	15.9	18.9
West South Central	25	29	164	90,952	86,430	76,042	3,839	3,284	10,797	11,564	9,246	19.6	16.9	16.8
Mountain	28	39	49	37,120	35,107	31,091	1,636	1,392	6,217	5,252	4,657	19.4	17.5	33.5
Pacific	33	29	85	62,296	56,244	50,850	3,030	2,597	8,065	8,074	7,119	22.5	16.7	13.3

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

** PAY ROLL NOT AVAILABLE FOR YEAR 1936. PAY ROLL INCLUDES COMPENSATION OF BOTH FULL-TIME AND PART-TIME EMPLOYEES, BUT NOT OF PROPRIETORS AND FIRM MEMBERS OF UNINCORPORATED BUSINESSES.

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Immediate Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report (4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

HARDWARE

The business of 271 hardware wholesalers -- establishments which accounted for 38 percent of the total for all service and limited-function hardware wholesalers in 1935, the last year for which a regular Census of Business was taken -- increased 17.2 percent in the second quarter over the first quarter of this year, but was short 19.9 percent when the second quarter of 1938 is compared with the similar period of 1937. Considering 1937 as a whole, sales of the 271 wholesalers were 10.5 percent higher than for the year 1936 and 29.4 percent above 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in another report issued in connection with the Census Survey of Business.

Of the 271 hardware wholesalers reporting for this Survey, 175 are classified as full-line and 96 as specialty-line houses. Both classes show substantial increase in business in the second quarter over the first quarter of this year, but when the second quarter of 1938 is compared with the second quarter of 1937, full-line houses are found to be off 19.5 percent and specialty houses by 24.6 percent. Sales of both classes of wholesalers reached their high, for the four quarters of 1937 and the first two of 1938, in the second quarter of 1937 from which they dropped slightly in the third quarter. More pronounced declines are found in the fourth quarter of 1937 and the first of 1938. As stated above, business incressed during the second quarter of this year but was still short of the total for the same period of 1937.

COMPARISON OF SALES BY QUARTERS

The number of establishments reporting together with percentage changes in net sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

PERIOD	Service and limited-function wholesalers		
	Total	Full-line	Specialty-lines
Number of establishments reporting	271	175	96
Percent increase (+) or decrease (-) in sales			
1st Qr. to 2nd Qr. 1937	+ 19.2	+ 19.8	+ 12.4
2nd Qr. to 3rd Qr. 1937	- 3.0	- 2.7	- 6.3
3rd Qr. to 4th Qr. 1937	- 11.2	- 11.4	- 8.9
4th Qr. 1937 to 1st Qr. 1938	- 20.6	- 20.8	- 18.7
1st Qr. 1938 to 2nd Qr. 1938	+ 17.2	+ 17.9	+ 8.6
1st Qr. 1937 to 1st Qr. 1938	- 18.5	- 18.2	- 21.9
2nd Qr. 1937 to 2nd Qr. 1938	- 19.9	- 19.5	- 24.6

1937 Compared with 1935

When 1937 is compared with 1935, substantial increases are noted in sales, pay roll and stocks on hand for both classes of wholesalers. Sales of the 175 full-line houses increased 28.6 percent as compared with a 24.5 percent increase in pay roll and a 19.6 percent increase in stocks. Similarly, sales of the 96 short line establishments increased 39.8 percent in 1937 over 1935 while pay roll was up 35.3 percent and stocks of merchandise 28.9 percent in dollar volume.

Sales, pay roll and stocks, 1937 and 1935 for both full-line and specialty-line hardware wholesalers are given below:

	1937	1935	Percent increase 1937 over 1935
Full-line - 175 establishments			
Net sales	$194,320,000	$151,136,000	28.6
Pay roll	20,692,000	16,623,000	24.5
Stocks on hand (end of year)	43,918,000	36,732,000	19.6
Specialty-line - 96 establishments			
Net sales	$ 15,713,000	$ 11,238,000	39.8
Pay roll	2,075,000	1,534,000	35.3
Stocks on hand (end of year)	3,484,000	2,702,000	28.9

These and many other facts pertaining to the wholesale hardware establishments reporting for this Survey are given in the attached tables, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 271 houses which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale hardware trade. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935 are not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale hardware trade, those with sales for the year 1935 of less than $25,000 were omitted from the mailing list.

38 Percent Sample for Hardware Wholesalers

Reporting for this Survey is purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale hardware houses for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 175 full-line houses (service and limited-function wholesalers) represented 29 percent of the total number and accounted for 39 percent of sales for the classification in 1935. Likewise, the 96 specialty-line houses represented 18 percent of the number of establishments and 27 percent of their sales for the year 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample, both of the establishments and sales is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the fourth wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

HARDWARE

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938			
	ESTABLISHMENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	24	38	271	$210,033	$48,015	$57,222	$55,506	$49,290	$39,137	$45,864	-18.5	-19.9
Hardware (full line)	29	39	175	194,320	44,218	52,953	51,504	45,645	36,172	42,644	-18.2	-19.5
Hardware (specialty lines)	18	27	96	15,713	3,797	4,269	4,002	3,645	2,965	3,220	-21.9	-24.6
Hardware (full line)												
New England	30	47	11	8,044	1,645	2,295	2,042	2,062	1,364	1,964	-17.1	-14.4
Middle Atlantic	33	43	51	30,989	7,235	8,777	7,790	7,187	5,931	7,322	-18.0	-16.6
East North Central	30	52	27	54,771	11,845	15,008	14,594	13,324	9,068	11,302	-23.4	-24.7
West North Central	34	46	15	34,821	8,284	9,326	9,539	7,672	6,544	7,323	-21.0	-21.5
South Atlantic	18	18	19	9,427	2,286	2,499	2,439	2,203	1,952	1,906	-14.6	-23.7
East South Central	18	17	9	6,550	1,648	1,723	1,625	1,554	1,485	1,422	- 9.9	-17.5
West South Central	29	35	16	17,465	3,880	4,396	4,696	4,293	3,755	4,161	- 3.2	- 5.3
Mountain	32	47	8	10,463	2,210	2,863	2,868	2,522	1,777	2,208	-19.6	-22.9
Pacific	39	36	19	21,790	5,185	6,066	5,711	4,828	4,296	5,036	-17.1	-17.0
Hardware (specialty lines)												
Middle Atlantic	20	33	43	8,477	2,045	2,222	2,109	2,101	1,580	1,722	-22.7	-22.5
East North Central	17	26	19	3,016	737	813	792	674	513	547	-30.4	-32.7
West North Central	19	34	7	1,278	305	390	346	237	277	288	- 9.2	-27.7
Pacific	19	23	12	1,292	321	388	326	257	265	291	-17.4	-25.0
Other divisions	16	15	15	1,650	389	456	429	376	330	378	-15.2	-19.1

+ INCREASE - DECREASE

※ PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

HARDWARE

TABLE 2.- SALES, PAYROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB-LISH-MENTS REPORT-ING 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB-LISH-MENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	24	38	271	$210,033	$190,049	$162,374	$22,767	$13,157	$47,402	$45,251	$39,434	29.4	25.4	20.2
Hardware (full line)	29	39	175	194,320	176,630	151,136	20,692	16,623	43,918	42,148	36,732	28.6	24.5	19.6
Hardware (specialty lines)	18	27	96	15,713	13,419	11,238	2,075	1,534	3,484	3,103	2,702	39.8	35.3	28.9
Hardware (full line)														
New England	30	47	11	8,044	7,554	6,673	950	824	2,245	2,142	2,005	20.5	15.3	12.0
Middle Atlantic	33	43	51	30,989	26,977	23,559	3,662	2,856	6,553	6,152	5,422	31.5	28.2	20.9
East North Central	30	52	27	54,771	50,604	41,017	6,199	4,765	11,806	11,504	9,376	33.5	30.1	25.9
West North Central	34	46	15	34,821	33,924	29,839	3,742	3,248	7,555	7,797	6,761	16.7	15.2	11.7
South Atlantic	18	18	19	9,487	8,843	7,556	963	790	2,888	2,779	2,285	24.8	21.9	23.8
East South Central	18	17	9	6,550	5,633	5,566	554	523	1,311	1,270	1,269	17.7	5.9	3.3
West South Central	29	35	16	17,465	14,851	12,158	1,525	1,201	3,852	3,411	3,206	43.7	27.0	20.1
Mountain	32	47	8	10,463	9,588	8,087	907	731	2,147	2,045	1,837	29.4	24.1	16.9
Pacific	39	36	19	21,790	18,716	16,681	2,190	1,685	5,621	5,048	4,571	30.6	30.0	23.0
Hardware (specialty lines)														
Middle Atlantic	20	33	43	8,477	7,270	5,954	1,116	829	1,753	1,599	1,321	42.4	34.6	32.7
East North Central	17	26	19	3,016	2,537	2,009	409	267	571	504	411	50.1	53.2	38.9
West North Central	19	34	7	1,278	1,194	1,148	190	177	335	305	309	11.3	7.3	8.4
Pacific	19	23	12	1,292	1,103	823	151	92	426	365	313	57.0	64.1	36.1
Other divisions	16	15	15	1,650	1,315	1,304	209	169	399	330	348	26.5	23.7	14.7

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

** PAY ROLL NOT AVAILABLE FOR YEAR 1936. PAY ROLL INCLUDES COMPENSATION OF BOTH FULL-TIME AND PART-TIME EMPLOYEES, BUT NOT OF PROPRIETORS AND FIRM MEMBERS OF UNINCORPORATED BUSINESSES.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report (4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

INDUSTRIAL MACHINERY, EQUIPMENT AND SUPPLIES (except oil well supply houses)*

Dollar sales of 606 distributors specializing in the sale of industrial machinery, equipment and supplies -- identical establishments accounting for 38 percent of the total for the trade in 1935, the latest year covered by a regular business census -- increased 2.2 percent in the second quarter over the first quarter of 1938, but were 35.9 percent less than sales for the second quarter of 1937. Considered on an annual basis, their total 1937 business was 18.0 percent above 1936, and 55.0 percent higher than for 1935.

In addition to the 606 distributors, 412 sales branches owned by manufacturers of industrial machinery, equipment and supplies and operated primarily for the disposal of their products are included in this Survey. Dollar sales of these branches increased 6.2 percent in the second quarter over the first quarter of this year, but were 37.7 percent under the total for the second quarter of 1937. Their sales for 1937 were 18.2 percent above 1936, and 43.0 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Establishments engaged primarily in selling industrial machinery, equipment and supplies are divided into two general groups; those selling industrial equipment and supplies, and those whose primary business is the sale of industrial machinery. Of the 606 distributors, 406 are classified as equipment and supply houses -- 85 sell a full line of equipment and supplies; 41 sell principally belting, hose and packing; 15 specialize in power transmission equipment; 16 specialize in the rope, cordage and twine business and 249 sell miscellaneous lines -- and 200 as distributors of industrial machinery -- 56 sell construction machinery (including road building); 16 specialize in machine tools; 14 distribute mine and quarry machinery; 15 specialize in power plant machinery; 28 sell used machinery; and 71 specialize in miscellaneous lines. Dollar sales of the 406 equipment and supply houses increased slightly (0.7%) in the second quarter over the first quarter of this year, but were still substantially below the corresponding total for the second quarter of 1937 (37.2%). Sales of industrial machinery houses increased 5.7 percent in the second quarter over the first quarter of this year, but were 32.9 percent short of the second quarter of 1937.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation by quarters) for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers			Manufacturers' sales branches		
	Total	Industrial equipment and supply houses	Industrial machinery distributors	Total	Industrial equipment and supplies	Industrial machinery
Number of establishments included	606	406	200	412	308	104
Percent increase (+) or decrease (-) in sales						
1st Qr. to 2nd Qr. 1937	+ 14.4	+ 11.7	+ 21.3	+ 22.8	+ 13.2	+ 45.1
2nd Qr. to 3rd Qr. 1937	- 9.2	- 9.2	- 9.1	- 2.9	- 11.8	+ 13.1
3rd Qr. to 4th Qr. 1937	- 16.4	- 17.2	- 14.6	- 27.3	- 20.7	- 36.7
4th Qr. 1937 to 1st Qr. 1938	- 17.4	- 17.0	- 18.2	- 16.9	- 15.2	- 20.0
1st Qr. 1938 to 2nd Qr. 1938	+ 2.2	+ 0.7	+ 5.7	+ 6.2	+ 3.8	+ 10.8
1st Qr. 1938 vs. 1st Qr. 1937	- 28.2	- 30.3	- 22.9	- 28.0	- 32.8	- 16.9
2nd Qr. 1938 vs. 2nd Qr. 1937	- 35.9	- 37.2	- 32.9	- 37.7	- 38.4	- 36.5

* Oil well supply houses are presented in a separate report.

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks, both for distributors and for manufacturers' sales branches, when 1937 is compared with 1935. Dollar sales of the 606 wholesalers were up 55.0 percent as compared with a 47.9 percent rise in pay roll, and a 26.0 percent increase in the value of stocks on hand at the end of the year. The 412 manufacturers' sales branches show a 43.0 percent increase in sales, 35.9 percent rise in pay roll, and 41.3 percent increase in stocks.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks are given below:

	Number of establishments	Percent increase, 1937 over 1935		
		Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers	606	55.0	47.9	26.0
Industrial equipment and supplies	406	50.3	44.1	26.5
Industrial machinery	200	67.6	57.2	24.6
Manufacturers' sales branches	412	43.0	35.9	41.3
Industrial equipment and supplies	308	38.2	31.7	45.2
Industrial machinery	104	52.4	42.7	29.3

These and other facts pertaining to sales, pay roll and stocks of the establishments included herein are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 606 distributors and 412 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale industrial machinery, equipment and supplies trade. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Distributors and branches that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale industrial machinery, equipment and supplies business, those with sales for the year 1935 of less than $25,000, were also omitted.

35% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale industrial machinery, equipment and supply houses for the entire year of 1935 and which still operate in a similar manner.

The importance of those included is shown by the fact that the 606 distributors (service and limited-function) represented 23 percent of the number and accounted for 38 percent of the total sales for all industrial machinery, equipment and supply wholesalers in 1935. Likewise, the 412 manufacturers' sales branches represented 57 percent of the number of branches and 64 percent of their sales for the year 1935. For convenience in evaluating the importance of the establishments reporting, the percent sample, both of establishments and sales, is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

INDUSTRIAL MACHINERY, EQUIPMENT AND SUPPLIES
(except oil well supply houses)

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES YEAR 1937 (.add 000)	NET SALES BY QUARTERS (.add 000)						PERCENT CHANGE	
					1937				1938			
	ESTABLISHMENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	1ST QR 1937 TO 1ST QR 1938	2ND QR 1937 TO 2ND QR 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	23	38	606	$197,777	$ 48,817	$55,849	$ 50,715	$42,396	$ 35,087	$35,796	-28.2	-35.9
Industrial equipment and supplies	27	43	406	139,509	35,133	39,849	35,622	29,505	24,483	24,656	-30.3	-37.2
Industrial (full line)	45	50	85	63,488	15,755	17,863	16,494	13,380	10,474	10,494	-33.5	-41.3
Belting hose and packing	24	40	41	7,409	2,004	2,139	1,896	1,320	1,139	1,234	-43.2	-42.3
Power transmission equipment	23	21	15	2,842	569	629	548	496	391	371	-31.3	-41.0
Rope, cordage and twine	25	22	16	3,701	1,049	1,143	845	664	679	726	-35.2	-36.5
All other	24	42	249	68,675	15,759	17,425	15,849	13,644	11,800	11,829	-25.1	-32.1
Industrial machinery	18	28	200	58,268	13,684	16,600	15,093	12,891	10,544	11,140	-22.9	-32.9
Construction (including road building)	20	27	56	25,633	5,445	7,885	6,410	5,893	4,473	5,734	-17.9	-27.3
Machine tools	20	27	16	5,736	1,135	1,567	1,974	1,356	995	631	-12.2	-59.8
Mining and quarrying	16	38	14	5,150	1,616	1,706	1,510	1,318	1,042	950	-35.5	-44.3
Power plant	23	42	15	4,188	990	965	1,145	1,088	758	788	-23.4	-18.3
Used machinery and equipment	15	22	26	3,882	940	1,170	1,008	764	707	572	-24.8	-51.1
All other	18	28	71	13,689	3,558	3,507	3,146	2,472	2,569	2,465	-27.8	-29.7
Geographic Divisions												
UNITED STATES	23	38	606	197,777	48,817	55,849	50,715	42,396	35,087	35,796	-28.2	-35.9
New England	23	33	50	10,443	2,588	3,165	2,581	2,109	1,698	1,788	-34.4	-43.5
Middle Atlantic	22	36	173	44,832	11,370	12,347	11,029	10,086	9,258	8,202	-18.6	-33.6
East North Central	25	43	149	52,473	13,398	14,435	13,822	10,818	8,218	8,256	-40.1	-43.0
West North Central	21	35	41	16,442	3,836	5,280	3,186	4,400	2,088	2,543	-35.8	-33.4
South Atlantic	17	26	31	13,270	3,369	3,658	3,415	2,834	2,331	2,434	-30.8	-33.4
East South Central	27	41	21	10,113	2,347	2,800	2,779	2,187	1,769	1,826	-24.6	-34.8
West South Central	26	46	35	21,561	4,568	5,890	5,525	5,874	4,525	4,447	- 5.8	-24.5
Mountain	19	22	13	4,255	1,064	1,238	1,111	842	755	602	-29.0	-35.2
Pacific	26	42	93	27,888	6,893	8,502	7,287	5,836	4,985	5,528	-30.6	-35.0
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	57	64	412	214,333	49,994	61,406	59,617	43,316	35,983	38,229	-28.0	-37.7
Industrial equipment and supplies	65	71	308	136,953	34,911	39,583	34,868	27,646	23,445	24,338	-32.8	-38.4
Industrial (full line)	71	89	5	4,338	899	1,198	1,205	1,036	689	684	-23.4	-42.9
Belting hose and packing	73	88	39	26,872	6,681	7,411	7,123	5,657	4,632	5,701	-30.7	-23.1
Power transmission equipment	58	93	47	10,656	2,611	2,998	2,835	2,212	1,855	1,744	-29.0	-41.8
Rope, cordage and twine	83	99	15	8,918	2,340	2,819	2,284	1,475	1,477	1,901	-36.9	-32.6
All other	65	68	204	86,169	22,380	25,102	21,421	17,266	14,792	14,408	-33.9	-42.6
Industrial machinery	41	53	104	77,380	15,083	21,878	24,749	15,670	12,538	13,891	-16.9	-36.5
Construction (including road building)	30	45	24	15,515	3,437	4,311	4,439	3,328	2,778	2,972	-19.2	-31.1
Mining and quarrying	15	9	8	2,317	528	633	548	608	441	358	-16.5	-43.4
All other	60	73	72	59,548	11,118	16,934	19,762	11,734	9,319	10,561	-16.2	-37.6
Geographic Divisions												
UNITED STATES	57	64	412	214,333	49,994	61,406	59,617	43,316	35,983	38,229	-28.0	-37.7
New England	1/	1/	33	11,140	2,819	3,115	3,113	2,093	1,846	2,232	-34.5	-28.4
Middle Atlantic	--	--	101	67,109	17,796	19,033	18,459	13,821	13,248	12,979	-25.7	-31.8
East North Central	--	--	117	86,774	20,963	24,820	23,124	17,867	13,337	13,725	-36.4	-44.7
West North Central	--	--	35	11,670	2,211	3,517	3,819	2,123	1,729	2,314	-19.1	-34.2
South Atlantic	--	--	24	9,105	1,906	2,302	2,394	1,501	1,386	1,418	-27.3	-38.4
East South Central	--	--	27	9,409	1,969	2,918	2,744	1,794	1,953	2,009	- 0.3	-31.0
West South Central	--	--	67	17,712	3,694	5,049	5,370	3,599	3,165	3,998	-14.3	-20.8
Pacific	--	--	8	2,414	636	658	692	428	448	496	-29.6	-24.6
Other divisions	--	--										

- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

INDUSTRIAL MACHINERY, EQUIPMENT AND SUPPLIES
(except oil well supply houses)

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	Size Of Sample Compared With 1935 Census: Estab. Lish. ments %	Size Of Sample Compared With 1935 Census: Net* Sales %	No. Of Estab-lish-ments Includ-ed In 1937-38 Survey	Net Sales (add 000) 1937	Net Sales (add 000) 1936	Net Sales (add 000) 1935	Pay Roll** (add 000) 1937	Pay Roll** (add 000) 1935	Stocks On Hand End Of Year (add 000) 1937	Stocks On Hand End Of Year (add 000) 1936	Stocks On Hand End Of Year (add 000) 1935	Percent Increase 1935 to 1937: Net Sales	Percent Increase 1935 to 1937: Pay Roll	Percent Increase 1935 to 1937: Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	23	36	606	$197,777	$167,555	$127,614	$22,440	$15,177	$28,935	$26,128	$22,958	55.0	47.9	26.0
Industrial equipment and supplies	27	43	406	139,509	118,196	92,851	15,550	10,793	21,762	19,556	17,202	50.3	44.1	26.5
Industrial (full line)	45	50	85	53,482	52,697	40,132	6,832	4,523	11,375	10,396	9,176	58.2	51.1	24.0
Belting hose and packing	24	40	41	7,409	6,274	4,921	845	666	953	766	689	50.6	26.9	38.3
Power transmission equipment	23	21	15	2,842	1,720	1,399	346	210	274	254	254	60.3	64.8	7.9
Rope, cordage and twine	39	28	16	3,701	3,630	3,107	270	234	490	661	504	19.1	14.4	2.8
All other	24	42	249	62,675	53,895	43,292	7,257	5,158	8,670	7,449	6,579	44.8	40.7	31.8
Industrial machinery	18	28	200	58,268	49,359	34,763	6,890	4,584	7,173	6,572	5,756	67.6	57.2	24.6
Construction (including road building)	20	27	56	25,633	22,593	14,477	2,804	1,560	2,807	2,338	1,953	77.1	79.7	43.8
Machine tools	20	27	16	5,732	4,659	2,838	426	259	679	632	663	102.0	64.5	2.4
Mining and quarrying	16	38	14	6,150	5,170	4,262	654	441	892	890	898	44.3	48.8	-0.7
Power plant	23	42	15	4,182	5,453	2,489	538	382	334	366	300	72.8	40.8	11.3
Used machinery and equipment	15	22	28	3,882	3,463	2,650	659	396	897	770	638	46.5	61.4	37.5
All other	18	28	71	18,689	10,021	8,107	1,827	1,346	1,564	1,556	1,324	56.5	35.7	19.6
Geographic Divisions														
UNITED STATES	23	36	606	197,777	167,555	127,614	22,440	15,177	28,935	26,128	22,958	55.0	47.9	26.0
New England	23	33	50	10,445	9,607	7,078	1,229	849	1,670	1,442	1,186	47.5	44.8	40.8
Middle Atlantic	28	56	173	44,832	37,565	29,800	5,077	3,614	6,003	5,608	5,231	50.4	40.5	14.8
East North Central	25	43	149	52,475	45,704	34,492	6,378	4,288	6,915	6,432	5,676	52.1	48.7	21.8
West North Central	21	35	41	13,648	11,121	8,597	1,528	1,115	1,950	1,654	1,447	47.8	37.0	34.8
South Atlantic	17	26	31	15,270	11,363	8,439	1,366	965	2,117	1,895	1,733	57.3	43.6	22.2
East South Central	27	41	21	10,115	8,749	6,856	1,091	795	1,664	1,516	1,515	47.5	37.2	9.8
West South Central	26	46	35	21,851	16,022	12,014	2,254	1,822	3,093	2,618	2,101	82.0	78.6	47.2
Mountain	19	28	13	4,255	3,562	2,494	488	359	525	503	390	70.6	86.1	41.4
Pacific	26	42	95	27,888	23,574	17,768	3,015	2,050	5,000	4,466	3,697	57.0	48.5	35.2
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	57	64	412	214,333	181,353	149,880	18,011	13,251	23,074	19,740	16,333	43.0	35.9	41.5
Industrial equipment and supplies	65	71	308	136,953	118,628	99,111	10,751	8,150	17,048	15,487	12,287	38.2	31.7	45.2
Industrial (full line)	71	89	5	4,338	3,539	3,302	354	299	871	811	868	31.4	21.7	0.5
Belting hose and packing	73	88	37	26,872	25,726	23,698	2,439	1,944	1,967	1,504	1,582	13.4	25.5	24.3
Power transmission equipment	58	93	47	10,656	8,496	6,681	671	500	1,360	1,013	889	59.5	34.2	53.0
Rope, cordage and twine	85	99	15	8,918	7,427	6,771	421	315	2,139	1,772	1,554	31.7	33.7	37.6
All other	65	68	204	86,169	75,434	58,659	6,856	5,092	11,505	10,387	7,394	46.9	34.5	55.6
Industrial machinery	41	53	104	77,380	62,731	50,769	7,260	5,101	5,832	4,313	4,046	52.4	42.7	29.2
Construction (including road building)	30	45	24	15,515	11,910	8,475	806	423	1,139	765	930	83.1	90.5	22.5
Mining and quarrying	15	9	8	2,317	1,810	2,297	188	183	345	319	304	51.0	2.7	13.5
All other	60	73	72	59,548	49,211	40,209	6,286	4,495	3,748	5,229	2,812	48.1	39.8	33.3
Geographic Divisions														
UNITED STATES	57	64	412	214,333	181,353	149,880	18,011	13,251	23,074	19,740	16,333	43.0	35.9	41.3
New England	1/	1/	55	11,140	10,673	7,258	1,074	732	859	870	774	53.6	46.7	11.0
Middle Atlantic	--	--	101	67,109	57,748	49,105	6,397	4,922	7,995	6,683	4,419	39.5	30.0	78.9
East North Central	--	--	117	86,774	71,260	61,260	5,822	4,836	7,684	6,145	5,701	41.7	20.4	35.7
West North Central	--	--	35	11,670	9,455	8,470	1,174	769	1,394	1,311	1,186	37.8	52.7	17.5
South Atlantic	--	--	24	8,105	6,540	5,276	681	480	659	698	598	53.6	39.4	10.2
East South Central	--	--	27	9,459	7,460	6,354	973	755	1,450	1,295	1,325	48.1	28.9	10.2
Pacific	--	--	47	17,713	15,453	11,875	1,789	1,234	2,990	2,533	2,154	49.8	45.0	34.0
Other divisions	--	--	8	2,414	2,096	1,194	161	123	293	211	174	102.2	30.9	68.4

-- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

Preliminary report (4 pages)

DEPARTMENT OF COMMERCE

Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

JEWELRY

Dollar sales of 248 jewelry wholesalers -- identical establishments which accounted for 30 percent of the total business of all service and limited-function jewelry wholesalers in 1935, the latest year covered by a regular business census -- increased 4.5 percent in the second quarter over the first quarter of 1938, but were 34.2 percent short of sales for the second quarter of 1937. Considering 1937 as a whole, sales of the 248 wholesalers were 12.9 percent above 1936 and 49.2 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

Of the 248 jewelry wholesalers included in this Survey, 59 are classified as full-line houses, while 75 specialize in diamonds and other precious stones, 22 in clocks and watches, and 92 in other jewelry specialties. It is interesting to note that dollar sales of each class of establishment except those specializing in diamonds and precious stones increased each successive quarter during 1937, then declined sharply from the fourth quarter of 1937 to the first quarter of this year. Gains were registered in the second quarter of this year by all but "other jewelry" wholesalers, but the drop in the first quarter was so great that, in spite of the increase, sales in the second quarter were substantially below the corresponding amounts for the second quarter of 1937. The business of wholesalers specializing in diamonds and other precious stones decreased quarterly from the first quarter of 1937 through the first quarter of this year, then gained slightly in the second quarter.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers selling principally---				
	Total	Jewelry (full-line)	Clocks and Watches	Diamonds and other precious stones	Other jewelry spec.
Number of establishments included	248	59	22	75	92
Percent increase (+) or decrease (-) in sales					
1st Qr. to 2nd Qr. 1937	+ 4.8	+ 24.5	+ 32.5	- 11.3	+ 0.8
2nd Qr. to 3rd Qr. 1937	+ 13.4	+ 18.3	+ 30.9	- 7.1	+ 23.9
3rd Qr. to 4th Qr. 1937	+ 21.7	+ 45.9	+ 50.7	- 16.3	+ 17.6
4th Qr. 1937 to 1st Qr. 1938	- 54.4	- 62.7	- 78.3	- 32.5	- 45.3
1st Qr. 1938 to 2nd Qr. 1938	+ 4.5	+ 12.0	+ 45.9	+ 1.3	- 7.3
1st Qr. 1938 vs. 1st Qr. 1937	- 34.0	- 19.9	- 43.2	- 53.5	- 19.6
2nd Qr. 1938 vs. 2nd Qr. 1937	- 34.2	- 27.9	- 37.5	- 46.8	- 26.1

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and in the value of stocks on hand at the end of the year when 1937 is compared with 1935. Dollar sales of 59 full-line houses were up 45.5 percent as compared with an increase of 30.9 percent in pay roll, and 19.7 percent in stocks. Each of the specialty lines show a similar trend, with pay roll and stocks increasing relatively more than sales in the case of houses specializing in clocks and watches, and pay roll of "other

jewelry" wholesalers was up 52.4 percent as compared with 42.5 percent in dollar volume of business.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks are given below:

Kind of business	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Total (248 establishments)	49.2	45.1	25.6
Jewelry (full-line) (59 establishments)	45.5	30.9	19.7
Clocks and watches (22 establishments)	43.4	50.1	53.1
Diamonds and other precious stones (75 establishments)	66.2	57.3	18.9
Other jewelry specialties (92 establishments)	42.5	52.4	34.2

These and other facts pertaining to the sales, pay roll and stocks of 248 jewelry wholesalers, are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 248 establishments which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale jewelry business. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers who came into business subsequent to January 1, 1935 were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale jewelry business, those with sales for the year 1935 of less than $25,000 were also omitted.

30% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale jewelry establishments for the entire year 1935 and which still operate in a similar manner.

The importance of those included is shown by the fact that the 248 service and limited-function wholesalers represented 18 percent of the total number and accounted for 30 percent of the sales for this classification in 1935. For convenience in evaluating the Survey, the percent sample, both of establishments and sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

JEWELRY

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS: ESTABLISHMENTS %	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS: NET SALES %	NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES YEAR 1937 (000)	NET SALES BY QUARTERS (000): 1937 1ST QR. Jan. 1 Mar. 31	1937 2ND QR. April 1 June 30	1937 3RD QR. July 1 Sept. 30	1937 4TH QR. Oct. 1 Dec. 31	1938 1ST QR. Jan. 1 Mar. 31	1938 2ND QR. April 1 June 30	PERCENT CHANGE: 1ST QR. 1937 TO 1ST QR. 1938	PERCENT CHANGE: 2ND QR. 1937 TO 2ND QR. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	18	30	248	$69,164	$14,764	$15,478	$17,559	$21,363	$9,748	$10,184	-34.0	-34.2
Jewelry (full-line)	26	35	59	21,266	3,626	4,513	5,340	7,789	2,905	3,255	-19.9	-27.9
Clocks and watches	14	20	22	8,191	1,627	1,656	2,129	3,409	697	1,017	-43.2	-37.5
Diamonds and other precious stones	27	40	75	18,291	5,380	4,771	4,430	3,710	2,503	2,536	-53.5	-46.8
Other jewelry specialties	12	28	92	21,414	4,531	4,568	5,660	6,455	3,643	3,376	-19.6	-26.1
Geographic Divisions												
Jewelry (full-line)												
Middle Atlantic	24	35	25	7,035	1,374	1,556	1,743	2,362	974	993	-29.1	-36.2
East North Central	35	37	13	8,571	1,411	1,793	2,171	3,196	1,136	1,171	-19.5	-29.1
West North Central	31	37	5	1,305	181	233	294	397	168	219	+ 7.2	- 6.0
Pacific	26	35	7	2,614	365	539	684	1,026	336	455	- 7.9	-15.6
Other divisions	27	13	9	1,943	295	392	448	808	291	317	- 1.4	-19.1
Clocks and watches												
Middle Atlantic	15	13	18	4,323	632	836	1,054	1,803	421	561	-33.4	-32.9
Other divisions	14	61	4	3,868	995	790	1,077	1,606	276	456	-53.6	-42.3
Diamonds and other precious stones												
Middle Atlantic	29	43	66	17,107	5,082	4,467	4,116	3,442	2,315	2,301	-54.4	-48.5
Other divisions	24	32	9	1,184	298	304	314	268	188	235	-36.9	-22.7
Other jewelry specialties												
New England	15	28	7	760	172	140	236	212	161	126	- 6.4	-10.0
Middle Atlantic	12	31	61	15,131	3,316	3,230	3,956	4,627	2,463	2,225	-25.8	-31.1
East North Central	12	13	11	1,962	369	402	486	705	402	412	+ 8.9	+ 2.5
Pacific	13	10	9	2,400	507	586	647	658	489	454	- 3.6	-22.6
Other divisions	11	24	4	1,161	165	206	335	453	128	159	-22.4	-23.6

\+ INCREASE – DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 WHOLESALE DISTRIBUTION

JEWELRY

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	18	30	248	$69,164	$61,280	$46,367	$5,570	$3,940	$17,837	$15,441	$14,197	49.2	45.1	25.6
Jewelry (full line)	25	35	59	21,268	18,654	14,620	1,777	1,338	4,961	4,410	4,144	45.5	30.9	19.7
Clocks and watches	14	20	22	8,191	7,643	5,712	680	453	1,707	1,153	1,115	43.4	50.1	53.1
Diamonds and other precious stones	27	40	75	18,291	15,990	11,003	653	415	6,447	5,794	5,420	66.2	57.3	18.9
Other jewelry specialties	12	28	92	21,414	18,993	15,032	2,460	1,614	4,722	4,084	3,518	42.5	52.4	34.2
Geographic Divisions														
Jewelry (full line)														
Middle Atlantic	24	35	25	7,035	6,133	4,674	462	365	1,908	1,657	1,593	50.5	26.6	19.8
East North Central	32	57	13	8,571	7,463	5,904	837	628	1,502	1,494	1,374	45.2	33.3	16.6
West North Central	31	37	5	1,109	965	787	103	81	348	295	262	40.4	26.9	32.8
Pacific	26	35	7	2,614	2,510	1,886	236	168	664	513	430	38.6	40.5	45.1
Other Divisions	27	13	9	1,943	1,583	1,369	140	116	479	450	485	41.9	20.7	- 1.2
Clocks and watches														
Middle Atlantic	15	13	18	4,323	4,071	3,134	419	279	1,188	756	699	37.9	50.2	64.8
Other Divisions	14	61	4	3,868	3,572	2,578	261	174	555	397	416	50.0	50.0	33.4
Diamonds and other precious stones														
Middle Atlantic	29	43	66	17,107	14,722	10,021	599	385	6,256	5,602	5,195	70.7	55.6	20.4
Other Divisions	24	32	9	1,184	1,268	982	54	30	191	192	225	20.6	80.0	-15.1
Other jewelry specialties														
New England	15	28	7	760	670	683	117	90	321	294	301	11.3	30.0	6.6
Middle Atlantic	12	31	61	15,131	13,333	10,307	1,768	1,109	3,326	2,852	2,537	46.8	59.4	31.1
East North Central	12	13	11	1,962	1,648	1,118	248	165	330	237	178	75.5	49.4	85.4
Pacific	13	39	9	2,400	2,343	2,146	214	185	507	504	368	11.8	15.7	37.8
Other Divisions	11	24	4	1,161	1,005	778	113	64	238	197	154	49.2	76.6	77.6

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
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SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

LUMBER AND MILLWORK

Dollar sales of 326 wholesalers of lumber and millwork -- identical establishments which accounted for 35 percent of the total business of all service and limited-function wholesalers specializing in the lumber trade in 1935, the latest year covered by a regular business census -- increased 12.5 percent in the second quarter over the first quarter of 1938 but were still short 38.5 percent of the total for the same period of 1937. Considering 1937 as a whole, sales of the 326 wholesalers were 14.8 percent higher than for 1926 and 48.5 percent above 1935.

In addition to the 326 wholesalers, 10 manufacturers' sales branches reported for the current Survey. Dollar sales of these branches were up 15.4 percent in the second quarter over the first quarter of this year, but were 31.3 percent less than in the second quarter of 1937. Their 1937 sales, however, exceeded the total for 1935 by 68.8 percent. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

COMPARISON OF SALES BY QUARTERS

The number of establishments reporting together with percentage changes in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' Sales Branches
Number of establishments included	326	10
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 26.6	+ 38.0
2nd Qr. to 3rd Qr. 1937	- 14.0	- 11.8
3rd Qr. to 4th Qr. 1937	- 24.9	- 17.8
4th Qr. 1937 to 1st Qr. 1938	- 15.5	- 17.9
1st Qr. 1938 to 2nd Qr. 1938	+ 12.5	+ 15.4
1st Qr. 1938 vs. 1st Qr. 1937	- 30.8	- 17.8
2nd Qr. 1938 vs. 2nd Qr. 1937	- 38.5	- 31.3

1937 Compared with 1935

When 1937 is compared with 1935, substantial increases are noted in sales, pay roll and stocks for both service wholesalers and manufacturers' sales branches. Sales of the 326 wholesalers increased 48.5 percent, with a 39.5 percent rise in pay roll, and a 27.2 percent increase in the value of stocks on hand at the end of the year. Similarly, sales of the 10 manufacturers' sales branches increased 68.8 percent with a 47.9 percent rise in pay roll, while stocks were up 63.9 percent.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks are given below:

	Percent increase, 1935 over 1937		
	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (326 establishments)	48.5	39.5	27.2
Manufacturers' sales branches (10 establishments)	68.8	47.9	63.9

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2 by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 326 service and limited-function wholesalers and 10 manufacturers' sales branches that submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale lumber and millwork business. The canvass was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935, were not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for only a small portion of the wholesale lumber and millwork business, those with sales for the year 1935 of less than $25,000 are also omitted.

35% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale lumber and millwork houses or branches for the entire year of 1935, and which still operate in a similar manner. The importance of those included is shown by the fact that the 326 wholesalers represented 20 percent of the number and accounted for 35 percent of the total sales of all lumber and millwork wholesalers in 1935. For convenience in evaluating the Survey, the percent sample, both of establishments and of sales, is given for each classification, by geographic divisions, in Tables 1 and 2.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

LUMBER AND MILLWORK

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census: Establishments %	Size Of Sample Compared With 1935 Census: Net * Sales %	No. Of Establishments Included In 1937-38 Survey	Net * Sales Year 1937 (add 000)	Net Sales By Quarters (add 000): 1937 1st Qr. Jan. 1 Mar. 31	1937 2nd Qr. April 1 June 30	1937 3rd Qr. July 1 Sept. 30	1937 4th Qr. Oct. 1 Dec. 31	1938 1st Qr. Jan. 1 Mar. 31	1938 2nd Qr. April 1 June 30	Percent Change: 1st Qr. 1937 To 1st Qr. 1938	Percent Change: 2nd Qr. 1937 To 2nd Qr. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	20	35	326	$174,856	$41,894	$53,047	$45,627	$34,286	$38,983	$32,596	-30.8	-38.5
New England	16	23	15	7,584	1,544	2,049	1,881	2,110	1,112	1,396	-28.0	-31.9
Middle Atlantic	21	38	72	42,925	10,236	13,009	10,894	8,788	7,473	8,284	-27.0	-36.3
East North Central	28	33	99	29,618	7,787	8,602	7,732	5,557	4,560	5,125	-41.0	-40.4
West North Central	16	37	26	24,139	6,406	7,197	6,351	4,185	4,582	4,424	-28.5	-38.5
South Atlantic	20	31	44	15,433	3,622	4,714	4,000	3,097	2,433	2,773	-32.8	-41.2
East South Central	14	23	18	6,866	1,679	2,165	1,784	1,238	1,145	1,124	-31.8	-48.1
West South Central	10	14	10	3,338	907	873	779	779	597	648	-34.2	-25.8
Mountain	19	49	5	5,764	1,190	1,731	1,604	1,249	962	1,157	-19.5	-33.2
Pacific	21	46	37	39,189	8,593	12,709	10,602	7,385	6,119	7,667	-28.8	-39.7
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	26	36	10	8,053	1,751	2,417	2,132	1,753	1,439	1,660	-17.8	-31.3

~ DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

LUMBER AND MILLWORK

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	20	35	326	$174,856	$152,861	$117,762	$11,875	$8,515	$17,288	$15,834	$13,586	48.5	39.5	27.2
New England	16	23	15	7,584	6,544	5,210	660	460	943	824	622	45.6	43.5	51.6
Middle Atlantic	21	36	72	42,925	37,788	27,539	3,133	2,355	4,568	3,726	3,538	55.9	33.0	29.2
East North Central	28	33	99	29,618	26,050	20,193	2,662	1,780	4,171	3,848	3,432	46.7	49.6	21.5
West North Central	16	37	26	24,139	23,002	17,183	1,494	981	1,515	1,335	1,207	41.0	57.1	8.9
South Atlantic	20	31	44	15,433	13,471	10,100	1,380	792	1,174	1,037	846	58.8	66.7	38.8
East South Central	14	23	18	6,866	5,975	5,015	486	350	512	397	339	36.9	38.9	51.0
West South Central	10	14	10	3,338	3,306	2,631	193	117	340	348	319	26.8	65.0	6.6
Mountain	19	49	5	5,764	5,098	3,491	280	250	331	353	305	65.1	12.0	8.5
Pacific	21	45	37	39,189	31,033	26,459	1,647	1,460	3,934	3,340	2,986	48.1	12.8	31.7
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	26	36	10	8,053	7,273	4,770	627	424	1,908	1,107	1,164	68.8	47.9	63.9

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

MEATS AND PROVISIONS

Dollar sales of 452 meat and provision wholesalers -- identical establishments which accounted for 34 percent of the total business of all service wholesalers specializing in this business during 1935, the latest year covered by a regular business census -- increased 8.3 percent in the second quarter over the first quarter of 1938, but were 9.2 percent below the sales for the same quarter of 1937. Considering 1937 as a whole, sales of the 452 wholesalers were 13.5 percent higher than for 1936 and 24.5 percent above 1935.

In addition to 452 wholesalers, 866 manufacturers' sales branches reported for the current Survey of Business. Dollar sales for these branches were up 3.4 percent in the second quarter over the first quarter of this year, but were 9.9 percent less than for the same period of 1937. Their 1937 sales, however, exceeded the total for 1935 by 14.9 percent. These are among the conclusions announced by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

The number of establishments reporting, together with percentage changes in net sales (without adjustment for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' Sales Branches
Number of establishments included	452	866
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 8.9	+ 5.7
2nd Qr. to 3rd Qr. 1937	+ 4.6	+ 5.5
3rd Qr. to 4th Qr. 1937	- 4.5	- 0.7
4th Qr. 1937 to 1st Qr. 1938	- 16.1	- 16.8
1st Qr. 1938 to 2nd Qr. 1938	+ 8.3	+ 3.4
1st Qr. 1938 vs. 1st Qr. 1937	- 8.7	- 7.9
2nd Qr. 1938 vs. 2nd Qr. 1937	- 9.2	- 9.9

1937 Compared with 1935

When 1937 is compared with 1935, increases are noted in sales, pay roll and stocks for service wholesalers and also for manufacturers' sales branches. Sales of the 452 wholesalers increased 24.5 percent, with a 26.5 percent rise in pay roll, and a 23.2 percent rise in stocks. Similarly, sales of the 866 manufacturers' sales branches increased 14.9 percent with a 28.4 percent rise in pay roll, while stocks rose only 10.5 percent.

Pay Roll Increases

It is interesting to note that pay roll (including salaries of executives and officers) of service wholesalers increased more than sales between 1935 and 1937 resulting in a rise from $6.00 for each hundred dollars of sales in 1935 to $6.10 per hundred in 1937. This trend is general and occurs in seven of the nine geographic divisions. (See Table 2.) Manufacturers' sales branches follow a similar trend, pay roll rising from $3.10 per hundred dollars of sales in 1935 to $3.50 per hundred in 1937.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

Type of establishment	Percent increase 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (452 establishments)	24.5	26.5	23.2
Manufacturers' sales branches (866 branches)	14.9	28.4	10.5

These and other facts pertaining to sales, pay roll and stocks of the wholesale meats and provisions establishments included in this Survey are given in Tables 1 and 2, attached, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 452 wholesalers and 866 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale meat and provision business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935, were not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for only a small portion of the wholesale meat and provision business, those with sales for the year 1935 of less than $25,000 were likewise omitted from the mailing list.

34 Percent Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale meat and provision establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 452 service and limited-function wholesalers represented 20 percent of the total number and accounted for 34 percent of the sales for this classification in 1935, and the 866 manufacturers' sales branches represented 92 percent of the number and accounted for 92 percent of the business of all branches in 1935. For convenience in evaluating the importance of the establishments included, the percent sample, both of the establishments and sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

MEATS AND PROVISIONS

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS BY GEOGRAPHIC DIVISIONS

DIVISION	SAMPLE BASED ON 1935 CENSUS: ESTABLISHMENTS %	SAMPLE BASED ON 1935 CENSUS: NET SALES %	NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES 1937 (add 000)	NET SALES BY QUARTERS (add 000): 1937: 1ST QR. Jan. 1 Mar. 31	1937: 2ND QR. April 1 June 30	1937: 3RD QR. July 1 Sept. 30	1937: 4TH QR. Oct. 1 Dec. 31	1938: 1ST QR. Jan. 1 Mar. 31	1938: 2ND QR. April 1 June 30	PERCENT CHANGE: 1ST QR. 1937 TO 1ST QR. 1938	PERCENT CHANGE: 2ND QR. 1937 TO 2ND QR. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	20	34	458	$186,280	$42,918	$46,742	$48,907	$46,713	$39,185	$42,433	- 8.7	- 9.2
New England	21	31	58	25,876	5,665	6,625	7,302	6,284	5,365	5,847	- 5.3	-11.7
Middle Atlantic	27	36	159	71,379	16,994	18,277	18,705	17,403	15,492	16,316	- 8.8	-10.7
East North Central	18	35	104	46,167	10,637	11,503	11,809	12,218	8,847	10,586	-16.8	- 8.0
West North Central	15	34	18	5,899	1,320	1,462	1,612	1,505	1,286	1,413	- 2.6	- 3.4
South Atlantic	15	29	27	11,530	2,849	2,841	2,952	2,888	2,722	2,551	- 4.5	-10.2
East South Central	10	18	5	1,562	307	397	433	425	289	343	- 5.9	-13.6
West South Central	14	33	14	4,824	1,035	1,143	1,313	1,333	1,094	1,100	+ 5.7	- 3.8
Mountain	19	28	9	1,578	334	391	442	411	346	407	+ 3.6	+ 4.1
Pacific	21	34	58	16,465	3,777	4,103	4,339	4,246	3,744	3,870	- 0.9	- 5.7
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	92	92	866	1,146,682	267,981	283,320	298,862	296,719	246,838	255,282	- 7.9	- 9.9
New England	a	a	138	151,170	35,122	37,170	40,088	38,790	32,886	33,666	- 6.4	- 9.4
Middle Atlantic	a	a	223	364,688	85,011	89,270	94,629	95,478	79,231	81,782	- 6.8	- 8.8
East North Central	a	a	132	199,227	46,875	49,290	50,994	51,768	42,679	44,684	- 9.0	- 9.9
West North Central	a	a	41	63,006	14,443	15,929	16,635	15,999	13,007	14,409	- 9.9	- 9.5
South Atlantic	a	a	147	168,607	38,343	39,986	42,541	41,737	35,431	35,701	- 7.6	-10.6
East South Central	a	a	47	54,744	12,825	13,319	14,613	14,087	10,986	11,415	-10.1	-14.3
West South Central	a	a	74	77,035	17,907	19,222	19,907	19,999	16,746	17,296	- 6.5	- 9.5
Mountain	a	a	22	13,097	3,209	3,266	3,482	3,140	2,647	2,689	-17.5	-17.7
Pacific	a	a	42	61,308	14,846	15,328	15,973	15,161	13,225	13,600	-10.9	-11.3

+ INCREASE - DECREASE

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

a Figures not available for year 1935.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

MEATS AND PROVISIONS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	20	34	452	$185,280	$163,249	$146,799	$11,220	$8,872	$4,264	$4,496	$3,462	26.5	26.5	23.2
New England	21	31	58	25,876	23,348	21,433	1,564	1,251	662	803	670	20.7	25.0	1.8
Middle Atlantic	27	36	159	71,379	63,260	56,304	3,801	3,064	1,299	1,288	1,147	22.4	24.1	13.3
East North Central	18	35	104	46,167	36,391	35,714	2,921	2,305	1,159	1,136	873	29.3	26.7	32.8
West North Central	15	34	18	5,899	5,314	4,920	498	368	119	133	63	19.9	35.3	88.9
South Atlantic	15	29	27	11,530	10,952	9,833	695	566	385	433	259	17.3	18.6	10.0
East South Central	10	16	5	1,562	1,267	1,025	63	56	31	39	37	52.4	8.6	-16.2
West South Central	14	33	14	4,824	4,436	3,562	356	239	115	147	101	35.4	49.0	13.9
Mountain	19	26	9	1,578	1,412	1,318	156	110	61	67	37	19.7	43.6	64.9
Pacific	21	34	58	16,465	14,869	12,690	1,164	891	513	448	275	29.7	30.6	86.5
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	92	92	866	1,146,882	1,093,004	998,041	39,594	30,825	30,578	32,032	27,873	14.9	28.4	10.5
New England	a	a	138	151,170	144,622	135,223	4,568	3,979	3,772	3,849	3,400	11.8	14.8	10.9
Middle Atlantic	a	a	223	364,688	351,893	337,986	11,335	9,055	9,087	8,701	7,761	7.9	25.2	17.1
East North Central	a	a	132	199,227	191,061	165,534	6,882	5,483	3,782	4,026	3,348	20.4	25.5	13.0
West North Central	a	a	41	63,006	59,141	50,753	2,221	1,689	1,156	1,253	1,174	24.1	31.5	- 1.5
South Atlantic	a	a	147	162,607	153,189	140,413	5,877	4,309	5,764	6,309	5,293	15.8	36.4	8.9
East South Central	a	a	47	54,744	51,636	45,008	1,972	1,491	1,944	2,207	1,780	21.6	32.3	9.2
West South Central	a	a	74	77,035	73,147	64,264	3,204	2,432	2,582	3,048	2,686	19.8	31.7	- 3.9
Mountain	a	a	22	13,097	12,485	10,506	549	357	518	650	418	24.7	53.8	23.9
Pacific	a	a	42	61,308	55,830	48,334	2,986	2,030	1,973	1,989	1,813	26.8	47.1	8.8

— DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

a Figures not available for year 1935.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill.; Ind., Mich., Ohio, Wis.)
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SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

Preliminary report (4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38

Wholesale Distribution

OFFICE MACHINES AND EQUIPMENT (EXCEPT FURNITURE)

Dollar sales of 544 manufacturers' sales branches engaged primarily in selling office machines and equipment -- identical establishments which accounted for 65 percent of the total business of all branches specializing in this business during 1935, the latest year covered by a regular business census -- increased 0.8 percent in the second quarter over the first quarter of 1938, but were 16.9 percent under sales for the second quarter of 1937. Their 1937 sales, however, were 11.4 percent above 1936 and 36.0 percent higher than for the year 1935.

In addition to the manufacturers' sales branches, 30 wholesalers are included in this Survey. Dollar sales for these wholesalers during the second quarter of 1938 were 8.7 percent less than sales for the first quarter and 24.0 percent below sales for a similar period of 1937. Considering 1937 as a whole, their dollar sales were 15.1 percent above 1936 and 25.1 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Manufacturers' Sales Branches	Service and limited-function wholesalers
Number of establishments included	544	30
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	- 4.0	+ 1.0
2nd Qr. to 3rd Qr. 1937	- 11.7	- 7.1
3rd Qr. to 4th Qr. 1937	+ 6.0	- 4.6
4th Qr. 1937 to 1st Qr. 1938	- 12.0	- 6.0
1st Qr. 1938 to 2nd Qr. 1938	+ 0.8	- 8.7
1st Qr. 1938 vs. 1st Qr. 1937	- 20.9	- 15.9
2nd Qr. 1938 vs. 2nd Qr. 1937	- 16.9	- 24.0

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared with 1935. Dollar sales of the 544 manufacturers' sales branches were up 36.0 percent as compared with a 47.5 percent rise in pay roll and 21.0 percent increase in stocks on hand at the close of the year. The 30 wholesalers show a 25.1 percent increase in sales, 23.4 percent rise in pay roll and 10.3 percent increase in stocks.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Manufacturers' sales branches (544 establishments)	36.0	47.5	21.0
Service and limited-function wholesalers (30 estab.)	25.1	23.4	10.3

Pay Roll Increases

A significant trend is noted when pay roll (including salaries of executives and officers) is compared with sales. In 1935 pay roll of the 544 manufacturers' sales branches amounted to $25.00 for each hundred dollars of sales. It rose to $27.20 in 1937, to $30.30 in the first quarter and then dropped slightly to $28.70 in the second quarter of this year. For the 30 service wholesalers, it dropped from $19.70 per hundred dollars of sales in 1935, to $19.50 in 1937, then rose to $20.60 in the first quarter and to $23.30 in the second quarter of 1938.

Pay roll for each hundred dollars of sales, 1935, 1937 and the first two quarters of 1938 is given below:

	Pay roll per hundred dollars of sales			
	1938		1937	1935
	2nd Qr.	1st Qr.		
Manufacturers' sales branches (544 establishments)	$28.70	$30.30	$27.20	$25.00
Service and limited-function wholesalers (30 establishments)	$23.30	$20.60	$19.50	$19.70

These and other facts pertaining to sales, pay roll and stocks of the wholesale office machines and equipment establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 544 manufacturers' sales branches and 30 wholesalers which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale office machines and equipment business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and wholesalers that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale office machines and equipment business, those with sales for the year 1935 of less than $25,000 were also omitted.

33⅓ Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included in this release are limited to those operating as wholesale office machines and equipment houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 544 manufacturers' sales branches represented 57 percent of the number and accounted for 65 percent of the business of all branches in 1935, and the 30 service and limited-function wholesalers represented 15 percent of the total number and accounted for 33 percent of the sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

OFFICE MACHINES AND EQUIPMENT (except furniture)

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net * Sales Year 1937 ($ 000)	Net Sales By Quarters ($ 000)						Percent Change	
					1937				1938			
	Establishments %	Net * Sales %			1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	1st Qr. 1937 To 1st Qr 1938	2nd Qr. 1937 To 2nd Qr. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	15	33	30	$ 5,935	$ 1,544	$ 1,560	$ 1,449	$ 1,382	$ 1,299	$ 1,186	-15.9	-24.0
Middle Atlantic	22	39	11	2,044	557	558	478	457	449	402	-19.4	-28.0
East North Central	16	44	9	2,994	760	770	771	693	648	560	-15.5	-27.3
Other Divisions	14	17	10	897	227	232	206	232	208	224	- 8.4	- 3.4
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	57	65	544	96,028	25,912	24,878	21,961	23,277	20,494	20,662	-20.9	-16.9
New England	1/	1/	45	7,062	1,969	1,804	1,607	1,682	1,490	1,502	-24.3	-16.7
Middle Atlantic	--	--	109	27,501	7,763	7,054	5,952	6,732	6,078	5,773	-21.8	-18.2
East North Central	--	--	113	25,620	6,132	5,900	5,844	5,544	4,414	4,438	-28.0	-24.9
West North Central	--	--	61	7,864	2,082	2,045	1,825	1,912	1,591	1,740	-23.6	-14.9
South Atlantic	--	--	68	10,196	2,627	2,635	2,419	2,515	2,522	2,774	- 4.0	+ 5.3
East South Central	--	--	29	3,038	784	763	733	758	644	656	-17.9	-14.0
West South Central	--	--	51	6,758	1,712	1,712	1,632	1,702	1,580	1,530	- 7.7	-10.6
Mountain	--	--	19	1,918	471	546	469	432	380	376	-19.3	-31.1
Pacific	--	--	50	9,071	2,372	2,419	2,080	2,800	1,801	1,873	-24.1	-22.3

+ INCREASE - DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

OFFICE MACHINES AND EQUIPMENT (except furniture)

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		No. OF ESTAB-LISH-MENTS INCLUD-ED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB-LISH-MENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	15	33	30	$5,935	$5,156	$4,746	$1,155	$936	$672	$549	$609	25.1	23.4	10.3
Middle Atlantic	22	39	11	2,044	1,689	1,453	301	224	215	186	206	39.7	34.4	4.9
East North Central	16	44	9	2,994	2,696	2,545	650	547	264	199	249	17.6	18.8	6.0
Other divisions	14	17	10	897	831	738	204	165	193	164	154	21.5	23.6	24.7
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	57	65	544	96,028	86,237	70,634	26,084	17,689	8,923	8,111	7,377	36.0	47.5	21.0
New England	1/	1/	45	7,062	6,260	5,587	1,862	1,374	659	576	550	26.4	35.5	19.8
Middle Atlantic	--	--	109	27,501	24,290	19,541	7,993	5,158	2,421	2,246	2,080	40.7	55.0	16.4
East North Central	--	--	113	22,620	19,615	15,914	5,922	4,004	1,644	1,475	1,494	42.1	47.9	23.4
West North Central	--	--	61	7,864	7,370	6,292	2,167	1,605	822	792	708	25.0	35.0	16.1
South Atlantic	--	--	68	10,196	9,364	8,162	2,532	1,776	903	777	722	24.9	42.6	25.1
East South Central	--	--	28	3,036	2,775	2,206	770	554	359	334	226	37.7	39.0	21.7
West South Central	--	--	51	6,758	6,148	4,821	1,778	1,206	727	648	548	40.2	47.4	32.7
Mountain	--	--	19	1,918	1,811	1,518	544	391	247	219	203	26.4	45.6	21.7
Pacific	--	--	50	9,071	8,014	6,593	2,516	1,641	941	844	777	37.6	53.3	21.1

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

OIL WELL SUPPLY HOUSES

Dollar sales of 228 oil well supply wholesalers -- identical establishments accounting for 49 percent of the total business of all wholesalers specializing in this business in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were 10.0 percent under sales for the first quarter of this year, and 34.0 percent less than for the second quarter of 1937. Their total 1937 business, however, was 28.2 percent above 1936 and 56.8 percent higher than for the year 1935.

In addition to the wholesalers, 103 manufacturers' sales branches (owned by manufacturers and engaged chiefly in selling their products) are included in this Survey. Their dollar sales in the second quarter of 1938 were 14.9 percent below the first quarter, and 34.7 percent short of sales for the second quarter of 1937. Dollar sales for 1937 were 9.0 percent above 1936 and 47.6 percent higher than for the year 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	228	103
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	- 5.6	+ 21.6
2nd Qr. to 3rd Qr. 1937	- 5.3	- 7.2
3rd Qr. to 4th Qr. 1937	- 16.4	- 9.6
4th Qr. 1937 to 1st Qr. 1938	- 7.2	- 8.5
1st Qr. 1938 to 2nd Qr. 1938	- 10.0	- 14.9
1st Qr. 1938 vs. 1st Qr. 1937	- 30.7	- 6.7
2nd Qr. 1938 vs. 2nd Qr. 1937	- 34.0	- 34.7

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared with 1935. Dollar sales of the 228 wholesalers were up 56.8 percent as compared with a 44.8 percent rise in pay roll, and 46.6 percent increase in stocks on hand at the end of the year; and the 103 manufacturers' sales branches show a 47.6 percent rise in sales, 86.2 percent increase in pay roll, and 15.0 percent in the value of stocks on hand at the end of the year.

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
228 Service and limited-function wholesalers	56.8	44.8	46.6
103 Manufacturers' sales branches	47.6	86.2	15.0

Pay Roll Increases

A significant trend appears when pay roll (including salaries of executives and officers)

is compared with sales. In 1935, pay roll of the 228 wholesalers amounted to $4.60 for each hundred dollars of sales. It dropped to $4.30 in 1937, then, rose to $5.30 in the first quarter, and to $5.90 in the second quarter of this year. For manufacturers' sales branches, pay roll rose from $5.50 per hundred dollars of sales in 1935 to $6.90 during 1937; then to $8.10 in the first quarter, and to $8.90 in the second quarter of 1938.

	Pay roll per hundred dollars of sales			
	1938		1937	1935
	2nd Qr.	1st Qr.		
228 Service and limited-function wholesalers	$5.90	$5.30	$4.30	$4.60
103 Manufacturers' sales branches	8.90	8.10	6.90	5.50

These and other facts pertaining to sales, pay roll and stocks of the wholesale oil well supply establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 228 wholesalers and 103 manufecturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale oil well supply business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and supply houses that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale oil well supply business, those with sales for the year of 1935 of less than $25,000 were also omitted.

49% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as oil well supply houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 228 wholesalers represented 30 percent of the number and accounted for 49 percent of the sales for this classification in 1935, and the 103 manufacturers' sales branches represented 69 percent of the number and accounted for 68 percent of the business of all branches in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trades and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

OIL-WELL SUPPLY HOUSES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size of Sample Compared With 1935 Census		No. of Establishments Included in 1937-38 Survey	Net * Sales Year 1937	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938			
	Establishments %	Net * Sales %		(add 000)	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	1st Qr. 1937 To 1st Qr 1938	2nd Qr 1937 To 2nd Qr. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	30	49	228	$117,789	$32,846	$31,021	$29,376	$24,546	$22,773	$20,487	-30.7	-34.0
Middle Atlantic	27	54	12	9,555	2,636	2,436	2,127	2,354	1,936	1,733	-26.6	-28.9
East North Central	19	37	8	3,111	754	1,064	731	562	496	503	-34.2	-52.7
West North Central	35	47	20	8,326	2,485	2,081	2,369	1,371	824	695	-66.8	-66.6
West South Central	32	52	136	73,828	20,265	19,801	18,779	14,983	14,266	12,818	-29.6	-35.3
Mountain	50	59	10	3,886	1,125	1,097	913	753	718	673	-36.2	-38.7
Pacific	26	39	36	16,206	4,679	3,641	3,784	4,104	4,324	3,791	- 7.6	+ 4.1
Other divisions	15	46	4	2,873	902	899	653	419	209	274	-76.8	-69.5
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	69	68	103	27,941	6,400	7,784	7,227	6,530	5,974	5,082	- 6.7	-34.7
Middle Atlantic	1/	1/	6	1,939	495	523	445	476	262	228	-47.1	-56.4
East North Central	--	--	12	1,514	378	315	344	277	193	256	-48.9	-18.7
West North Central	--	--	10	2,728	647	834	793	454	361	276	-44.2	-66.9
South Atlantic	--	--	4	} 661	136	176	192	157	77	139	-43.4	-21.0
East South Central	--	--	3									
West South Central	--	--	53	17,714	4,054	4,980	4,516	4,164	4,291	3,358	+ 5.8	-32.6
Mountain	--	--	7	1,514	363	422	414	315	240	262	-33.9	-37.9
Pacific	--	--	8	2,071	327	534	523	687	550	563	+68.2	+ 5.4

\+ INCREASE - DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

OIL-WELL SUPPLY HOUSES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	30	49	288	$117,769	$91,845	$75,133	$5,019	$3,467	$14,492	$11,745	$9,886	56.8	44.8	46.6
Middle Atlantic	27	54	12	9,555	7,881	5,545	802	503	1,000	744	689	72.3	59.4	45.1
East North Central	19	37	8	3,111	1,745	1,729	133	98	215	140	105	79.9	35.7	104.8
West North Central	35	47	20	8,326	6,467	3,879	182	107	1,377	982	782	114.6	70.1	76.1
West South Central	32	52	138	73,828	58,310	49,304	2,450	1,684	9,121	7,512	6,626	49.5	45.5	37.7
Mountain	50	59	10	3,888	4,574	2,686	94	66	702	622	528	44.8	44.6	33.0
Pacific	26	39	36	16,208	10,888	10,663	1,111	914	1,950	1,631	1,042	52.0	21.6	87.1
Other divisions	15	46	4	2,873	1,980	1,247	247	96	127	114	114	130.4	157.3	11.4
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	69	68	103	27,941	25,645	18,933	1,940	1,042	7,046	7,144	6,188	47.6	86.2	15.0
Middle Atlantic	1/	1/	6	1,939	2,211	1,072	166	101	309	272	172	80.9	64.4	79.7
East North Central	--	--	12	1,314	991	948	102	53	406	344	256	38.6	92.5	58.6
West North Central	--	--	10	2,728	2,496	1,150	106	48	823	706	475	137.2	120.8	31.2
South Atlantic	--	--	4	661	793	508	55	34	229	195	142	30.1	61.8	61.3
East South Central	--	--	3											
West South Central	--	--	53	17,714	16,482	13,156	1,194	635	4,522	4,815	4,285	34.6	88.0	5.5
Mountain	--	--	7	1,514	1,467	1,211	68	55	517	495	515	25.0	23.6	0.4
Pacific	--	--	8	2,071	1,205	888	249	116	440	317	283	133.2	114.7	55.5

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

Preliminary report (4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

OPTICAL GOODS

Dollar sales of 124 optical goods wholesalers -- identical establishments which accounted for 40 percent of the total business of all service wholesalers specializing in this business during 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were 2.2 percent less than sales for the first quarter, and were 13.2 percent under sales for the same quarter of 1937. Considering 1937 as a whole, sales of the 124 wholesalers were 4.7 percent above 1936 and 24.8 percent higher than for the year 1935.

In addition to the 124 wholesalers, 152 manufacturers' sales branches reported for the current Survey of Business. Dollar sales for these branches in the second quarter of 1938 were 0.4 percent under sales for the first quarter, and were 19.8 percent less than sales for the second quarter of 1937. Their 1937 sales, however, exceeded the total for the year 1935 by 30.5 percent. These are among the conclusions announced by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

The number of establishments included in this Survey, together with percentage changes in net sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' Sales Branches
Number of establishments included	124	152
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 1.7	+ 4.9
2nd Qr. to 3rd Qr. 1937	+ 6.8	+ 4.0
3rd Qr. to 4th Qr. 1937	- 6.5	- 13.6
4th Qr. 1937 to 1st Qr. 1938	- 11.1	- 10.5
1st Qr. 1938 to 2nd Qr. 1938	- 2.2	- 0.4
1st Qr. 1938 vs. 1st Qr. 1937	- 9.7	- 15.6
2nd Qr. 1938 vs. 2nd Qr. 1937	- 13.2	- 19.8

1937 Compared with 1935

When 1937 is compared with 1935, increases are noted in sales, pay roll and stocks for service wholesalers and also manufacturers' sales branches. Sales of the 124 wholesalers increased 24.8 percent, while pay roll was up 26.1 percent, and stocks on hand at the end of the year, 19.3 percent. Sales of the 152 manufacturers' sales branches increased 30.5 percent, with a 20.9 percent rise in pay roll, and 47.2 percent increase in stocks.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

Type of establishment	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
Service and limited-function wholesalers (124 establishments)	24.8	26.1	19.3
Manufacturers' sales branches (152 establishments)	30.5	20.9	47.2

Pay Roll Increases

It is interesting to note that pay roll (including salaries of executives and officers) of service wholesalers increased more than sales between 1935 and 1937, but failed to register corresponding declines during the first two quarters of 1938, with the result that it rose from $24.10 for each hundred dollars of sales in 1935, to $24.30 in 1937; to $26.30 in the first quarter and to $27.00 in the second quarter of this year. For the 152 manufacturers' sales branches, pay roll dropped from $17.60 per hundred dollars of sales in 1935 to $16.30 per hundred in 1937, then rose to $19.30 in the first quarter and to $19.70 in the second quarter of this year.

Pay roll for each hundred dollars of sales, 1935, 1937 and the first two quarters of 1938 is given below for service wholesalers and manufacturers' sales branches.

Type of establishment	Pay roll per hundred dollars of sales			
	1938		1937	1935
	2nd Qr.	1st Qr.		
Service and limited-function wholesalers (124 establishments)	$27.00	$26.30	$24.30	$24.10
Manufacturers' sales branches (152 establishments)	19.70	19.30	16.30	17.60

These and other facts pertaining to sales, pay roll and stocks of the wholesale optical goods establishments included in this Survey are given in Tables 1 and 2 by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 124 service and limited-function wholesalers and 152 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale optical goods business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers who came into business subsequent to January 1, 1935 were not canvassed, and those ceasing operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale optical goods business, those with sales for the year 1935 of less than $25,000 are also omitted.

40% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale optical goods establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included is shown by the fact that the 124 service and limited-function wholesalers represented 32 percent of the total number and accounted for 40 percent of the sales for this classification in 1935, and the 152 manufacturers' sales branches represented 74 percent of the number and accounted for 92 percent of the business of all branches in 1935. For convenience in evaluating the importance of the establishments included, the percent sample, both of the establishments and sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

OPTICAL GOODS

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net * Sales For Year 1937	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr 1937 To 2nd Qr. 1938
	Establishments %	Net * Sales %		(add 000)	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	32	40	124	$13,915	$3,379	$3,435	$3,670	$3,431	$3,051	$2,983	- 9.7	-13.2
New England	43	74	12	1,455	345	352	378	380	290	307	-15.9	-12.8
Middle Atlantic	41	53	43	5,198	1,296	1,290	1,306	1,306	1,098	1,061	-15.4	-17.8
East North Central	14	26	14	2,627	644	681	719	613	652	586	+ 1.2	-16.0
West North Central	24	24	13	986	218	235	292	241	242	221	+11.0	- 6.0
South Atlantic	64	79	16	1,402	352	349	370	331	315	325	-10.5	- 6.9
Mountain	53	76	8	582	131	144	159	146	125	123	- 4.6	-15.8
Pacific	36	28	12	1,270	307	317	326	316	279	274	- 9.1	-13.6
Other Divisions	22	24	6	395	86	95	118	98	90	86	+ 4.7	- 9.5
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	1/ 74	1/ 92	152	22,814	5,589	5,861	6,095	5,269	4,718	4,698	-15.6	-19.8
New England	--	--	16	1,904	504	475	465	460	376	394	-25.4	-17.1
Middle Atlantic	--	--	22	6,780	1,671	1,797	1,721	1,591	1,393	1,435	-16.6	-20.1
East North Central	--	--	31	4,935	1,241	1,277	1,249	1,068	971	911	-21.8	-28.7
West North Central	--	--	19	2,624	617	648	725	604	567	509	- 8.1	-21.5
South Atlantic	--	--	21	1,887	469	469	513	437	414	402	-11.7	-14.3
East South Central	--	--	10	825	196	203	231	195	179	182	- 8.7	-10.3
West South Central	--	--	15	1,763	402	430	511	420	393	409	- 2.2	- 4.9
Mountain	--	--	4	429	101	109	117	102	81	79	-19.8	-27.5
Pacific	--	--	14	1,667	388	453	434	392	344	377	-11.3	-16.8

\+ Increase - Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

OPTICAL GOODS

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTAB-LISH-MENTS INCLUD-ED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTAB-LISH-MENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	32	40	124	$13,915	$13,289	$11,149	$3,362	$2,683	$2,332	$2,153	$1,954	24.8	26.1	19.3
New England	43	74	12	1,455	1,387	1,212	244	212	232	218	221	20.0	15.1	5.0
Middle Atlantic	41	53	43	5,198	5,092	4,107	1,238	985	961	889	803	26.6	25.7	19.7
East North Central	14	26	14	2,627	2,344	2,078	795	610	484	396	367	26.4	30.3	31.9
West North Central	24	24	13	986	948	807	326	250	126	138	90	22.2	30.4	40.0
South Atlantic	64	79	16	1,402	1,298	1,099	285	197	221	199	181	27.6	34.5	22.1
Mountain	53	76	8	582	565	496	147	130	72	71	67	17.3	13.1	7.5
Pacific	38	28	12	1,270	1,296	1,060	277	226	187	204	181	19.8	22.6	3.3
Other Divisions	22	24	6	395	359	290	90	73	49	44	44	36.2	23.3	11.4
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	1/74	1/92	152	22,814	21,093	17,486	3,725	3,082	4,546	3,624	3,098	30.5	20.9	47.2
New England	--	--	13	1,904	1,774	1,593	313	288	305	276	233	19.5	8.7	30.9
Middle Atlantic	--	--	28	6,780	6,068	4,682	884	650	1,636	1,217	1,104	44.8	36.0	48.2
East North Central	--	--	31	4,935	4,595	3,901	851	704	1,103	900	708	26.5	20.9	55.8
West North Central	--	--	19	2,624	2,501	2,103	433	431	474	386	334	24.8	12.1	41.9
South Atlantic	--	--	21	1,887	1,698	1,416	369	324	358	273	244	33.3	13.9	46.7
East South Central	--	--	10	825	778	664	173	161	112	108	97	24.2	7.5	15.5
West South Central	--	--	15	1,763	1,597	1,313	304	253	292	230	178	34.3	20.2	64.0
Mountain	--	--	4	429	397	361	78	77	88	70	58	18.8	1.3	51.7
Pacific	--	--	14	1,667	1,685	1,453	270	194	178	162	132	14.7	39.3	34.8

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

PAINTS AND VARNISHES

Dollar sales of 140 paint and varnish wholesalers -- identical establishments which accounted for 27 percent of the total business of all service wholesalers specializing in the paint trade in 1935, the latest year covered by a regular business census -- increased 50.7 percent in the second quarter over the first quarter of 1938, but were 13.4 percent short of sales for the same quarter of 1937. Considering 1937 as a whole, sales of the 140 paint wholesalers were 6.4 percent higher than for 1936 and 22.0 percent above 1935.

In addition to the 140 wholesalers, 148 manufacturers' sales branches were reported for the current Survey of Business. Dollar sales of these branches were up 3.0 percent in the second quarter over the first quarter of this year, but were 25.0 percent less than in the second quarter of 1937. Their 1937 sales, however, exceeded the total for the year 1935 by 39.0 percent. These are among the conclusions announced by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the Census Survey of Business.

COMPARISON OF SALES BY QUARTERS

The number of establishments reporting together with percentage changes in net sales (without adjustment for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

Period	Full-Service	Manufacturers' Sales Branches
Number of establishments included	140	148
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 57.7	+ 15.9
2nd Qr. to 3rd Qr. 1937	- 18.8	+ 13.6
3rd Qr. to 4th Qr. 1937	- 24.7	- 19.7
4th Qr. 1937 to 1st Qr. 1938	- 6.1	- 20.2
1st Qr. 1938 to 2nd Qr. 1938	+ 50.7	+ 3.0
1st Qr. 1938 vs. 1st Qr. 1937	- 9.4	- 15.7
2nd Qr. 1938 vs. 2nd Qr. 1937	- 13.4	- 25.0

1937 Compared with 1935

When 1937 is compared with 1935, substantial increases are noted in sales, pay roll and stocks, for both service wholesalers and manufacturers' sales branches. Sales of the 140 wholesalers increased 22.0 percent, as compared with a 32.7 percent rise in pay roll, and a 15.8 percent increase in stocks. Similarly, sales of the 148 manufacturers' sales branches increased 39.0 percent and pay roll 39.0 percent while stocks rose only 21.5 percent.

Pay Roll Increases

It is significant to note that pay roll (including salaries of executives and officers) of service wholesalers increased more than sales between 1935 and 1937 with the result that it rose from $12.10 for each hundred dollars of sales in 1935 to $13.20 per hundred in 1937. This trend is general and occurs in six of the seven geographic divisions for which data are shown separately. [See Table 2]. In the case of manufacturers' sales branches, both sales and pay roll rose 39.0 percent between 1935 and 1937.

Percentage increases, 1937 over 1935, in sales, pay roll and stocks, are given below:

Type of establishment	Percent increase 1937 over 1935		
	Sales	Pay roll	Stocks on hand (end of year)
Service wholesalers (140 establishments)	22.0	32.7	15.8
Manufacturers' sales branches (148 branches)	39.0	39.0	21.5

These and other facts pertaining to sales, pay roll and stocks of the wholesale paint establishments reporting for this Survey are given in Tables 1 and 2, attached, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 140 wholesalers and 148 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale paints and varnish business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935 were not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for only a small portion of the wholesale paints and varnish business, those with sales for the year 1935 of less than $25,000 were likewise omitted from the mailing list.

27 Percent Sample

Reporting for this Survey is purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those changing their general location or the nature of their operations since 1935. Establishments included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale paints and varnish establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 140 full-service and limited-function wholesalers represented 18 percent of the total number and accounted for 27 percent of sales for this classification in 1935, and the 148 manufacturers' sales branches represented 56 percent of the number and accounted for 44 percent of the business of all branches in 1935. For convenience in evaluating the importance of the establishments included, the percent sample, both of the establishments and sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

PAINTS AND VARNISHES

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	% NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. JAN. 1 MAR. 31	2ND QR. APRIL 1 JUNE 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	18	27	140	$28,069	$4,575	$7,216	$5,863	$4,415	$4,146	$6,250	- 9.4	-13.4
New England	15	24	8	1,172	262	371	292	247	225	348	-14.1	- 6.2
Middle Atlantic	17	19	36	4,652	907	1,446	1,237	1,062	826	1,268	- 8.9	-12.3
East North Central	25	39	52	8,409	1,713	2,975	2,262	1,460	1,451	2,388	-15.2	-16.9
West North Central	24	44	23	4,249	939	1,452	1,105	753	919	1,275	- 2.1	-12.2
South Atlantic	16	36	8	1,991	423	594	532	442	400	544	- 5.4	- 8.4
Pacific	8	13	7	765	163	218	207	177	150	204	- 8.0	- 6.4
Other Divisions	11	10	6	831	169	260	228	174	175	223	+ 3.6	-14.2
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	56	44	148	103,289	22,797	26,418	30,002	24,073	19,822	19,802	-15.7	-25.0
New England	a	a	10	8,891	2,276	2,298	2,463	1,854	1,634	1,700	-28.2	-26.0
Middle Atlantic	a	a	17	15,458	3,679	4,219	4,587	3,973	3,106	2,915	-15.5	-30.9
East North Central	a	a	29	33,381	7,606	8,858	9,694	7,223	5,994	6,130	-21.2	-30.8
West North Central	a	a	14	6,456	1,364	1,332	2,147	1,613	1,215	975	-10.9	-26.8
South Atlantic	a	a	10	6,832	1,489	1,798	1,957	1,593	1,409	1,396	- 5.4	-22.1
East South Central	a	a	5	6,893	1,327	1,365	1,893	1,708	1,270	1,281	- 4.3	-10.6
West South Central	a	a	4									
Mountain	a	a	8									
Pacific	a	a	51	25,178	5,056	6,547	7,261	6,312	4,594	5,464	- 9.2	-16.5

+ INCREASE — DECREASE

※ PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

a Figures not available for year 1935.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

PAINTS AND VARNISHES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census: Establishments %	Size Of Sample Compared With 1935 Census: Net* Sales %	No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000) 1937	Net Sales (add 000) 1936	Net Sales (add 000) 1935	Pay Roll** (add 000) 1937	Pay Roll** (add 000) 1935	Stocks On Hand End Of Year (add 000) 1937	Stocks On Hand End Of Year (add 000) 1936	Stocks On Hand End Of Year (add 000) 1935	Percent Increase 1935 to 1937: Net Sales	Percent Increase 1935 to 1937: Pay Roll	Percent Increase 1935 to 1937: Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	18	27	140	$22,069	$20,747	$18,095	$2,908	$2,192	$4,185	$4,036	$3,615	22.0	32.7	15.8
New England	15	24	8	1,172	1,134	1,065	177	145	235	262	235	10.0	22.1	0.0
Middle Atlantic	17	19	36	4,652	4,452	4,022	562	485	1,022	1,009	831	15.7	15.9	23.0
East North Central	25	39	52	8,409	7,842	6,475	1,197	831	1,433	1,366	1,272	29.9	44.0	12.7
West North Central	24	44	23	4,249	3,931	3,471	540	386	792	724	706	22.4	39.9	12.2
South Atlantic	16	36	8	1,991	2,018	1,852	237	185	379	390	291	8.7	28.1	30.2
Pacific	8	13	7	765	629	581	86	65	98	80	85	31.7	32.3	15.3
Other Divisions	11	10	6	831	741	649	109	95	226	205	195	28.0	14.7	15.9
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	56	44	148	103,289	89,476	74,334	9,128	6,566	12,608	10,471	10,378	39.0	39.0	21.5
New England	e	a	10	8,691	7,709	6,107	642	523	527	452	414	42.3	22.8	27.3
Middle Atlantic	e	a	17	16,458	14,334	12,129	1,125	893	1,654	1,303	1,134	35.7	26.0	45.9
East North Central	a	a	29	33,381	29,264	25,271	2,604	1,849	2,817	2,518	2,865	32.2	40.8	- 1.7
West North Central	a	a	14	6,456	5,540	4,349	491	387	684	643	558	48.4	26.9	22.6
South Atlantic	a	a	10	6,832	5,438	5,110	549	374	543	446	474	33.7	46.8	14.6
East South Central	a	e	5											
West South Central	e	a	4	6,293	5,395	4,974	505	375	846	732	709	26.5	34.7	19.3
Mountain	e	e	8											
Pacific	e	a	51	25,178	21,756	18,294	3,212	2,165	5,537	4,379	4,224	37.6	48.4	31.1

— Decrease.

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

a Figures not available for year 1935.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

PAPER AND ITS PRODUCTS

Based on information furnished by 536 wholesale paper houses, establishments which accounted for 35 percent of the total for the trade in 1935 the last year for which a regular census of business was taken, sales declined steadily during the last two quarters of 1937 and the first two quarters of this year. After rising 5.8 percent in the second over the first quarter of 1937, sales declined 6.5 percent in the third quarter and 6.7 percent in the fourth. Between the fourth quarter of 1937 and the first quarter of this year, business dropped 9.5 percent then declined 1.2 percent in the second quarter. Sales of 58 manufacturers' sales branches which accounted for 33 percent of the business for this classification in 1935 followed the same general trend as for merchant wholesalers, but with a greater decline in the first half of 1938 as compared with the first half of 1937 -- 26.0 percent for manufacturers' branches as compared with 19.3 percent for merchant wholesalers. These are among the conclusions announced by William L. Austin, Director, Bureau of the Census, in the third report issued in connection with the Census Survey of Business.

For census purposes, wholesale paper houses are classified as wrapping or coarse paper and products; fine or printing and writing paper; stationery and stationery supplies; and wall paper. Sales of the first three classes of merchant wholesalers followed the general downward trend since the second quarter of 1937, the only exception being a 1.3 percent rise for coarse paper in the second quarter of this year, and stationery houses reached their high for the period covered in the third quarter of 1937. Wall paper wholesalers, however, reached their low in the second quarter of 1937 after which business increased for each consecutive quarter through the first half of this year.

COMPARISON OF SALES BY QUARTERS

The number of the various classes of establishments reporting, together with the percentage change in net sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, is given below:

PERIOD	Service and limited-function wholesalers selling principally---					Manufacturers' Sales Branches
	Total	Wrapping and Coarse Paper	Fine or Printing and Writing Paper	Stationery and Stationery Supplies	Wall Paper	
Number of establishments reporting	536	352	81	83	20	58
Percent increase (+) or decrease (-) in sales						
1st Qr. to 2nd Qr. 1937	+ 5.8	+ 7.1	+ 1.4	- 0.5	+36.4	+ 7.0
2nd Qr. to 3rd Qr. 1937	- 6.5	- 6.2	-11.4	+19.2	-47.0	- 3.6
3rd Qr. to 4th Qr. 1937	- 6.7	- 7.9	- 5.5	- 1.0	+13.5	-22.3
4th Qr. 1937 to 1st Qr. 1938	- 9.5	-10.0	- 3.3	-25.6	+25.1	- 3.3
1st Qr. 1938 to 2nd Qr. 1938	- 1.2	+ 1.3	- 8.6	- 7.7	+11.3	- 2.3
1st Qr. 1937 to 1st Qr. 1938	-16.5	-16.7	-17.9	-12.7	+ 2.6	-22.5
2nd Qr. 1937 to 2nd Qr. 1938	-22.0	-21.2	-26.0	-19.0	-16.3	-29.2

1937 Compared with 1935

Considered on an annual basis, sales of the reporting establishments increased substantially in 1937 over 1935. The business of merchant wholesalers as a group was up 27.7 percent and of manufacturers' sales branches 27.8 percent. Fine or printing and writing paper houses registered the largest gain (29.0%) while wall paper shows the smallest (7.5%). Sales for each class of establishment but

wall paper show e somewhat greater increase than either pay roll or stocks of merchandise on hand for resale at the end of the year.

The percentage increases, 1937 over 1935, in sales, pay roll and stocks for the various classes of establishments, are given below:

	Service and limited-function wholesalers selling principally---					Manufacturers' Sales Branches
	Total	Wrapping and Coarse Paper	Fine or Printing and Writing Paper	Stationery and Stationery Supplies	Wall Paper	
Number of establishments reporting	536	352	81	83	20	58
Net sales (percent increase 1935 to 1937)	27.7	28.5	29.0	21.5	7.5	27.8
Pay roll (percent increase 1935 to 1937)	17.3	18.0	14.0	17.4	27.0	18.6
Stocks (percent increase 1935 to 1937)	16.0	16.6	10.9	12.5	65.6	21.5

These and many other facts pertaining to the wholesale paper establishments reporting for this Survey are given in the attached tables, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 536 wholesale houses and 58 manufacturers' sales branches which submitted returns for the current Census Survey of Business prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale paper trade. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1936 are not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale paper trade, establishments with sales for the year 1935 amounting to less than $25,000 were also omitted from the mailing list.

35 Percent Sample for Merchant Wholesalers

Reporting for this Survey is purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. The houses included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale paper establishments for the entire year 1935 and which still operate in a similar manner. The importance of those included herein is shown by the fact that the 536 wholesale houses (service and limited-function wholesalers) represented 21 percent of the total number and accounted for 35 percent of sales for the classification in 1935. Likewise, the 58 manufacturers' sales branches represented 28 percent of the number of branches and 33 percent of their sales for the year 1935. For convenience in evaluating the importance of the establishments reporting, the percent eample, both of the establishments and sales is given for each classification in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the third wholesale report issued in connection with the census Survey of Business: 1937-38. It will be followed promptly by similar releasee for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Goenell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

PAPER AND ITS PRODUCTS

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTAB. LISHMENTS REPORTING IN 1937-38 SURVEY	NET SALES 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938			
	ESTAB. LISHMENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR April 1 June 30	1ST QR. 1937 To 1938	2ND QR. 1937 To 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	21	35	536	$183,336	$46,167	$43,840	$45,690	$42,639	$39,569	$38,096	-16.5	-22.0
Wrapping or coarse paper and products	22	35	352	129,847	32,450	34,760	32,610	30,027	27,017	27,381	-16.7	-21.2
Fine or printing and writing paper	38	47	81	37,774	10,041	10,185	9,021	8,527	8,243	7,536	-17.9	-26.0
Stationary and stationery supplies	16	28	83	13,195	3,031	3,015	3,593	3,556	2,647	2,442	-12.7	-19.0
Wall paper	8	14	20	2,520	645	880	466	529	662	737	+ 2.6	-16.3
Geographic Divisions												
Wrapping or coarse paper and products												
New England	18	31	32	10,071	2,553	2,750	2,523	2,246	2,122	2,243	-16.9	-18.4
Middle Atlantic	22	32	141	43,733	11,297	11,589	10,769	10,080	9,158	9,161	-18.9	-21.0
East North Central	23	40	67	35,617	9,002	9,763	8,868	7,964	7,039	6,988	-21.8	-28.4
West North Central	20	28	22	8,589	2,165	2,283	2,185	2,016	2,011	1,885	- 7.1	-15.2
South Atlantic	23	25	31	7,390	1,893	1,973	1,886	1,638	1,627	1,603	-14.1	-18.8
East South Central	15	27	6	2,581	625	708	647	601	525	529	-16.0	-25.3
West South Central	35	45	18	5,360	1,260	1,377	1,381	1,342	1,197	1,240	- 5.0	-10.0
Mountain	17	13	3	720	168	177	191	189	162	159	- 0.6	-10.2
Pacific	31	58	32	15,784	3,493	4,200	4,140	3,951	3,176	3,573	- 9.1	-14.9
Fine or printing and writing paper												
New England	57	70	8	3,806	1,097	1,024	844	841	826	767	-24.7	-25.1
Middle Atlantic	34	45	32	14,824	3,994	4,051	3,547	3,332	3,190	2,887	-18.1	-28.7
East North Central	42	45	18	11,407	3,025	3,105	2,760	2,517	2,628	2,238	-13.1	-27.9
West North Central	75	62	9	3,955	988	1,036	971	960	732	762	-25.9	-26.4
South Atlantic	47	39	7	2,475	711	644	571	549	566	549	-20.4	-14.8
All other	28	38	7	1,307	326	325	328	328	301	333	- 7.7	+ 2.5
Stationary and stationery supplies												
New England	15	23	7	704	136	93	122	353	110	85	-19.1	- 8.6
Middle Atlantic	18	31	49	7,378	1,782	1,770	1,988	1,838	1,606	1,422	-14.1	-19.7
East North Central	15	36	12	3,153	704	730	946	773	608	588	-13.6	-19.5
West North Central	18	31	6	1,180	250	236	378	316	241	182	- 3.6	-22.9
All other	14	12	9	780	159	186	219	186	183	165	+ 3.2	-11.3
Wall paper												
United States	8	14	20	2,520	645	880	466	529	662	737	+ 2.6	-16.3
MANUFACTURERS' SALES BRANCHES												
UNITED STATES	28	33	58	62,703	16,066	17,188	16,574	12,875	12,452	12,164	-22.5	-29.2
Middle Atlantic	17	28	8	28,694	7,479	7,720	7,361	6,114	6,373	5,756	-16.1	-25.4
East North Central	56	71	28	27,413	6,897	7,673	7,202	5,641	5,096	5,315	-26.1	-30.7
All other	20	15	22	6,596	1,690	1,795	1,991	1,120	1,083	1,093	-35.9	-39.1

\+ INCREASE — DECREASE

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

PAPER AND ITS PRODUCTS

TABLE 2.–SALES, PAYROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

KIND OF BUSINESS AND DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL* (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	21	35	536	$183,336	$163,069	$143,524	$19,107	$16,293	$24,577	$23,521	$21,183	27.7	17.3	16.0
Wrapping or coarse paper and products	22	35	352	129,847	114,086	101,043	12,996	11,018	16,776	15,942	14,389	28.5	18.0	16.6
Fine or printing and writing paper	36	47	81	37,774	34,342	29,274	3,886	3,409	4,950	5,029	4,463	29.0	14.0	10.9
Stationery and stationery supplies	16	28	83	13,195	12,214	10,863	1,764	1,503	2,139	2,016	1,901	21.5	17.4	12.5
Wall paper	8	14	20	2,520	2,427	2,344	461	363	712	534	430	7.5	27.0	65.6
Geographic Divisions Wrapping or coarse paper and products														
New England	18	31	32	10,071	9,065	8,150	1,157	991	1,498	1,480	1,357	23.6	16.8	10.4
Middle Atlantic	22	32	141	45,735	37,624	34,095	4,234	3,472	4,894	4,696	4,142	34.1	21.9	18.2
East North Central	23	40	67	35,617	31,568	27,158	3,318	2,698	3,786	3,777	3,321	31.2	14.5	13.1
West North Central	20	28	22	8,589	7,801	7,285	781	671	1,179	971	972	17.9	16.4	21.3
South Atlantic	23	26	31	7,290	6,669	5,735	705	612	1,009	1,002	863	28.9	15.2	22.7
East South Central	15	27	6	2,581	2,404	2,195	348	295	591	605	498	17.6	18.0	18.7
West South Central	35	45	18	5,360	4,757	4,336	719	595	1,012	910	867	23.6	20.8	16.7
Mountain	17	13	3	720	644	556	55	44	100	97	82	29.5	25.0	22.0
Pacific	31	56	32	15,784	13,554	11,539	1,679	1,440	2,657	2,475	2,231	36.8	16.6	19.1
Fine or printing and writing paper														
New England	57	70	8	3,806	3,598	3,283	421	381	339	346	295	15.9	10.5	14.9
Middle Atlantic	34	45	32	14,824	13,526	11,476	1,565	1,290	1,680	1,797	1,551	29.2	12.6	8.3
East North Central	42	45	18	11,407	10,885	8,723	1,141	1,019	1,686	1,661	1,452	30.8	12.0	16.1
West North Central	75	62	9	3,355	3,216	2,704	321	293	447	423	434	46.3	9.6	3.0
South Atlantic	47	39	7	2,475	2,516	1,969	259	185	495	511	474	25.7	40.0	13.6
All other	22	32	7	1,307	1,201	1,119	179	141	305	371	297	16.8	27.0	2.7
Stationery and stationery supplies														
New England	15	22	7	704	670	597	97	84	82	70	86	19.9	15.5	- 4.7
Middle Atlantic	18	31	49	7,378	6,911	6,258	918	795	1,081	1,096	1,001	17.9	14.7	8.0
East North Central	15	36	12	3,153	2,841	2,492	445	372	521	437	431	26.5	19.6	20.9
West North Central	18	31	6	1,180	1,073	903	218	178	267	244	243	30.7	22.5	9.9
All other	14	12	9	780	719	623	92	74	168	169	140	25.2	24.3	34.3
Wall paper United States	8	14	20	2,520	2,427	2,344	461	363	712	534	430	7.5	27.0	65.6
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	28	33	58	62,703	56,142	49,064	2,758	2,325	2,179	1,952	1,794	27.8	18.6	21.5
Middle Atlantic	17	28	8	28,694	24,946	21,385	1,002	770	459	383	326	34.2	30.1	40.8
East North Central	56	71	28	27,413	24,541	20,587	1,421	1,281	1,444	1,254	1,294	33.2	10.9	11.6
All other	20	15	22	6,596	6,655	7,092	335	274	276	315	174	-7.0	22.3	58.6

* PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

** PAY ROLL NOT AVAILABLE FOR YEAR 1936. PAY ROLL INCLUDES COMPENSATION OF BOTH FULL-TIME AND PART-TIME EMPLOYEES, BUT NOT OF PROPRIETORS AND FIRM MEMBERS OF UNINCORPORATED BUSINESSES. – DECREASE

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report (4 pages)

Census Survey of Business: 1937-38

Wholesale Distribution

PLUMBING AND HEATING EQUIPMENT AND SUPPLIES

Dollar sales of the 486 wholesalers of plumbing and heating equipment and supplies -- identical establishments accounting for 38 percent of the total sales of all establishments specializing in this business during 1935, the latest year covered by a regular business census -- increased 23.5 percent in the second quarter over the first quarter of 1938, but were 23.6 percent under sales for the second quarter of 1937. Their total 1937 business, however, was 14.3 percent above 1936 and 57.3 percent higher than for the year 1935.

In addition to the 486 wholesalers, 243 sales branches owned and operated by manufacturers of plumbing and heating goods primarily for the disposal of their products are included in this Survey. Sales of the 243 branches increased 24.0 percent in the second quarter over the first quarter of this year but were 32.4 percent less than in the second quarter of 1937. Their sales for the year 1937 as a whole were 69.1 percent above 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

Of the 486 wholesalers included in this Survey, 242 are classified as full-line houses, 50 are engaged primarily in selling heating equipment (including stoves and ranges), 170 sell plumbing fixtures, and 24 establishments handle miscellaneous lines. Dollar sales of all classes increased in the second quarter compared with the first quarter of this year, but were below the total for the second quarter of 1937. The 1937 business of each class of houses shows a substantial gain over 1935.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers selling principally ---					Manufacturers' sales branches
	Total	Plumbing and heating (full-line)	Heating (including stoves and ranges)	Plumbing fixtures	All other	
Number of establishments included	486	242	50	170	24	243
Percent increase (+) or decrease (-) in sales						
1st Qr. to 2nd Qr. 1937	+22.8	+26.6	+10.5	+17.5	+16.1	+23.6
2nd Qr. to 3rd Qr. 1937	+ 7.4	+ 6.1	+36.3	+ 3.9	+26.2	0.0
3rd Qr. to 4th Qr. 1937	-10.9	-11.9	+ 2.3	-10.7	-14.5	-11.2
4th Qr. 1937 to 1st Qr. 1938	-35.4	-35.4	-52.3	-30.5	-43.1	-38.6
1st Qr. 1938 to 2nd Qr. 1938	+23.5	+28.3	+ 6.7	+15.3	+30.2	+24.0
1st Qr. 1938 vs. 1st Qr. 1937	-24.1	-23.6	-26.5	-24.3	-28.7	-32.6
2nd Qr. 1938 vs. 2nd Qr. 1937	-23.6	-22.5	-29.0	-25.7	-20.0	-32.4

1937 Compared with 1935

Decided increases are noted in sales, pay roll and stocks for 1937 compared with 1935. Dollar sales of the 486 wholesalers were up 57.3 percent as compared with a 40.8 percent rise in pay roll, and 23.1 percent in stocks on hand at the close of the year. Likewise, sales for the 243 manufacturers' sales branches rose 69.1 percent, accompanied by a 54.3 percent increase in pay roll, and 41.4 percent in stocks on hand at the end of the year.

Kind of Business	Percentage increases, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
486 Service and limited-function wholesalers	57.3	40.8	23.1
Plumbing and heating (full-line) (242 establishments)	57.2	40.7	22.6
Heating (including stoves and ranges) (50 establishments)	43.0	35.9	37.4
Plumbing fixtures (170 establishments)	62.3	42.3	19.9
All other (24 establishments)	44.1	43.6	38.9
243 Manufacturers' sales branches	69.1	54.3	41.4

These and other facts pertaining to the sales, pay roll and stocks of the wholesalers and manufacturers' sales branches included herein, are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 486 wholesalers and 243 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale plumbing and heating equipment and supplies business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and supply houses that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale plumbing and heating equipment and supplies business, those with sales for the year 1935 of less than $25,000 were also omitted.

38% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale plumbing and heating equipment and supplies houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that 486 wholesalers represented 28 percent of the number and accounted for 38 percent of the business of all plumbing and heating wholesalers in 1935, and the 243 manufacturers' sales branches represented 66 percent of the number and accounted for 71 percent of the sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divieions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

PLUMBING AND HEATING EQUIPMENT AND SUPPLIES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	38	36	486	$143,994	$30,495	$37,437	$40,613	$35,449	$23,152	$28,590	-24.1	-23.6
Plumbing and heating (full-line)	48	48	242	91,206	19,032	24,088	25,563	22,523	14,545	18,667	-23.6	-22.5
Heating (including stoves and ranges)	22	22	50	7,860	1,526	1,686	2,298	2,350	1,122	1,197	-26.5	-29.0
Plumbing fixtures, equipment & supplies	20	28	170	40,439	9,017	10,595	11,004	9,823	6,829	7,872	-24.3	-25.7
All other	16	31	24	4,489	920	1,068	1,748	1 153	656	854	-28.7	-20.0
Plumbing and heating (full-line)												
New England	31	37	17	3,977	867	998	1,091	1,021	620	815	-28.5	-18.3
Middle Atlantic	45	45	91	28,907	5,952	7,387	8,201	7,447	4,634	5,921	-22.1	-19.8
East North Central	47	49	41	18,703	3,975	4,685	5,370	4,673	2,900	3,389	-29.6	-27.7
West North Central	45	55	15	8,568	1,689	2,324	2,496	2,059	1,305	1,785	-22.7	-23.2
South Atlantic	51	41	33	10,750	2,047	2,926	3,088	2,749	1,740	2,870	-15.0	-22.4
East South Central	56	59	9	3,693	730	1,022	1,050	891	574	754	-21.4	-25.8
West South Central	69	75	9	4,431	976	1,284	1,162	1,007	862	996	-11.9	-22.4
Mountain	73	76	8	3,866	812	1,114	1,114	826	601	757	-26.0	-32.0
Pacific	68	72	19	8,231	1,962	2,546	2,051	1,650	1,409	1,970	-28.9	-16.1
Heating (including stoves and ranges)												
New England	19	30	5	1,078	188	243	296	349	141	161	-25.0	-25.5
Middle Atlantic	18	17	14	1,826	313	403	512	598	247	277	-21.1	-31.3
East North Central	33	26	17	2,987	710	623	831	823	478	431	-32.7	-30.8
West North Central	27	35	6	859	180	159	317	203	84	107	-30.0	-32.7
Other divisions	19	19	8	1,110	195	256	340	317	172	201	-11.8	-22.1
Plumbing fixtures, equipment & supplies												
New England	15	23	12	2,668	675	651	715	627	405	525	-40.0	-19.4
Middle Atlantic	20	27	70	13,324	2,975	3,556	3,909	3,282	2,225	2,481	-25.2	-30.3
East North Central	20	29	40	10,067	2,153	2,498	2,884	2,532	1,656	1,832	-23.0	-26.7
West North Central	16	33	7	1,860	325	497	561	477	263	400	-19.1	-17.9
South Atlantic	16	19	8	1,943	432	483	517	511	347	366	-19.7	-24.2
East South Central	33	44	4	1,105	229	295	309	272	188	250	-17.9	-15.3
West South Central	19	26	5	1,955	455	501	549	450	414	461	- 9.0	- 8.0
Mountain	43	50	3	1,749	365	494	480	410	268	355	-26.6	-28.1
Pacific	22	32	18	5,768	1,408	1,628	1,460	1,272	1,061	1,202	-24.6	-26.2
All other												
Middle Atlantic	18	41	9	1,867	384	475	565	443	228	330	-40.6	-30.5
Pacific	32	60	8	1,623	320	376	489	436	303	346	- 5.3	- 8.5
Other divisions	14	22	7	999	216	215	294	274	125	178	-42.1	-17.2
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	66	71	243	123,472	27,017	33,395	33,392	29,668	18,812	22,576	-32.6	-32.4
Plumbing and heating (full-lins)	--	--	38	17,319	3,580	4,561	4,898	4,280	2,821	3,929	-21.2	-13.9
Heating (including stoves and ranges)	--	--	34	30,901	5,955	7,932	9,065	7,951	3,604	4,686	-39.5	-40.9
Plumbing fixtures, equipment & supplies	--	--	137	72,105	16,759	20,043	18,609	16,694	11,813	13,979	-33.1	-33.7
All other	--	--	14	3,147	723	859	802	763	574	682	-20.6	-20.6
Plumbing and heating												
New England	67	72	22	8,222	1,757	2,303	2,161	1,981	1,167	1,497	-33.6	-35.0
Middle Atlantic	58	57	62	28,069	5,961	7,765	7,545	6,798	4,241	5,424	-28.9	-30.1
East North Central	71	76	48	28,503	6,260	7,467	7,611	6,965	3,625	4,557	-42.1	-39.0
West North Central	56	68	21	10,885	2,112	2,616	3,360	2,775	1,517	1,960	-28.2	-25.1
South Atlantic	68	70	23	10,140	2,109	2,408	2,822	2,807	1,454	1,907	-31.1	-20.6
East South Central	92	99	11	4,443	1,101	1,324	1,546	1,470	944	959	-14.3	-27.6
West South Central	90	98	16	10,676	2,384	3,224	2,713	2,357	1,968	2,200	-17.5	-31.8
Mountain	77	93	10	3,985	906	1,106	1,065	888	580	759	-36.0	-31.4
Pacific	64	80	28	17,551	4,427	5,188	4,509	3,627	2,716	3,315	-38.7	-36.1

– DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
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WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 WHOLESALE DISTRIBUTION

PLUMBING AND HEATING EQUIPMENT AND SUPPLIES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)			STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935		1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS															
UNITED STATES	28	38	486	$143,994	$125,961	$91,564	$14,398	$10,225		$23,298	$21,975	$18,931	57.3	40.8	23.1
Plumbing & heating (full-line)	46	48	242	91,206	80,191	58,037	8,646	6,147		15,120	14,364	12,332	57.2	40.7	22.6
Heating (including stoves and ranges)	22	22	50	7,860	7,374	5,495	1,200	863		1,455	1,311	1,059	43.0	35.9	37.4
Plumbing fixtures, equipment and supplies	20	28	170	40,439	34,438	24,916	3,875	2,722		6,148	5,808	5,126	62.3	42.3	19.9
All other	16	31	24	4,489	3,978	3,116	679	473		575	492	414	44.1	43.6	38.9
Plumbing & heating (full-line)															
New England	31	37	17	3,977	3,766	3,222	401	396		745	685	656	23.4	1.3	-13.0
Middle Atlantic	45	45	91	28,987	26,305	19,585	2,867	2,168		5,102	4,915	4,370	48.0	32.2	16.8
East North Central	47	41	41	15,703	14,499	10,399	1,703	1,074		2,568	2,455	1,939	79.9	58.6	32.4
West North Central	45	55	15	8,568	7,792	6,072	893	674		1,570	1,578	1,505	41.1	32.5	4.3
South Atlantic	51	41	33	10,730	9,590	7,125	937	654		1,486	1,418	1,077	50.9	43.3	38.0
East South Central	56	59	9	3,693	3,270	1,974	261	160		502	460	301	87.1	63.0	66.8
West South Central	69	75	9	4,431	3,877	2,252	298	226		669	585	441	96.7	31.9	51.7
Mountain	73	76	8	3,866	3,714	3,228	292	183		650	594	458	73.5	59.6	41.9
Pacific	68	72	19	8,251	8,078	5,179	994	598		1,888	1,804	1,386	56.9	67.9	32.0
Heating (including stoves and ranges)															
New England	19	30	5	1,078	880	653	183	112		278	261	150	65.1	63.4	85.3
Middle Atlantic	18	17	14	1,826	1,660	1,360	286	219		413	411	353	32.3	30.6	17.0
East North Central	33	26	17	2,987	2,698	1,975	456	347		546	490	339	51.2	32.0	44.8
West North Central	27	35	6	859	964	770	136	114		194	174	164	11.6	21.1	18.3
Other divisions	19	19	8	1,110	982	717	135	91		224	175	133	54.8	48.4	46.4
Plumbing fixtures, equipment and supplies															
New England	15	23	12	5,668	5,424	5,069	297	184		241	277	246	79.0	61.4	- 2.0
Middle Atlantic	20	27	70	13,324	11,480	8,965	1,145	903		1,988	1,898	1,717	55.5	26.6	15.8
East North Central	20	29	40	10,067	8,564	5,998	1,110	767		1,699	1,502	1,374	67.8	44.7	23.7
West North Central	16	33	7	1,860	1,585	1,111	207	162		287	274	241	67.4	27.8	19.1
South Atlantic	16	14	8	1,943	1,549	1,097	154	92		287	276	224	76.7	67.4	28.1
East South Central	33	44	4	1,105	1,017	751	133	94		208	234	190	47.1	41.5	9.5
West South Central	19	26	8	1,955	1,755	1,235	142	101		314	311	260	58.3	40.6	20.8
Mountain	43	30	3	1,749	1,515	1,017	151	108		403	368	278	72.0	39.8	23.8
Pacific	22	32	18	5,768	4,567	3,065	534	311		661	533	506	88.2	71.7	30.6
All other															
Middle Atlantic	18	41	9	1,867	1,702	1,647	334	265		180	202	199	13.4	26.0	0.6
Pacific	32	60	8	1,623	1,533	920	224	133		170	121	76.4	68.4	40.5
Other divisions	14	22	7	999	943	549	121	75		225	153	114	85.0	61.3	97.4
MANUFACTURERS' SALES BRANCHES (with stocks)															
UNITED STATES	66	71	243	123,472	102,817	73,016	10,421	6,755		16,511	14,415	11,674	69.1	54.3	41.4
Plumbing & heating (full-line)	--	--	38	17,319	15,080	12,698	1,297	1,047		3,204	3,000	2,632	36.4	23.9	21.7
Heating (including stoves and ranges)	--	--	54	30,901	29,108	17,248	3,214	1,830		3,169	2,457	1,661	79.2	76.6	88.5
Plumbing fixtures, equipment and supplies	--	--	137	72,105	55,471	40,405	5,654	3,676		9,653	8,667	7,155	78.5	53.8	35.3
All other	--	--	14	3,147	3,218	2,665	256	212		485	291	226	18.1	20.8	114.6
Plumbing and heating															
New England	67	72	22	8,822	6,946	5,315	741	537		1,235	1,114	838	54.7	38.0	47.4
Middle Atlantic	59	57	62	28,069	24,989	18,994	2,538	1,848		4,339	3,644	3,404	47.8	37.3	27.4
East North Central	71	78	48	28,503	23,336	14,871	2,460	1,376		2,720	2,454	1,829	91.7	78.8	48.9
West North Central	58	66	21	10,863	9,862	7,353	1,312	880		1,835	1,414	1,014	46.0	60.0	81.0
South Atlantic	68	70	25	10,140	9,154	6,202	703	440		928	934	673	63.5	59.8	46.4
East South Central	92	99	11	5,441	4,129	2,769	363	270		640	560	449	96.5	41.9	44.3
West South Central	90	98	18	10,678	8,251	5,213	595	368		1,330	1,123	967	101.0	61.7	37.5
Mountain	77	93	10	3,985	3,937	2,644	291	203		574	522	448	50.7	45.2	28.6
Pacific	64	80	28	17,551	12,651	9,555	1,398	893		2,900	2,455	2,091	83.7	56.6	38.7

- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
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PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

STORE, RESTAURANT AND HOTEL EQUIPMENT AND SUPPLIES

Dollar sales of 82 wholesalers of store, restaurant and hotel equipment and supplies -- identical establishments accounting for 25 percent of the total sales for all houses specializing in this business during 1935, the latest year covered by a regular business census -- increased 15.0 percent in the second quarter over the first quarter of 1938, but were still short 20.5 percent of sales for the second quarter of 1937. Considering 1937 as a whole, their sales were 20.0 percent above 1936 and 45.3 percent higher than for the year 1935.

In addition to the wholesalers, 41 manufacturers' sales branches are included in this Survey. Dollar sales of these branches increased 37.1 percent in the second quarter compared with the first quarter of this year, and were 19.9 percent less than sales for the second quarter of 1937. Total 1937 business of the 41 branches was 25.4 percent above 1936 and 57.9 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage change in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	82	41
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 35.3	+ 56.3
2nd Qr. to 3rd Qr. 1937	- 8.3	- 10.8
3rd Qr. to 4th Qr. 1937	+ 0.3	- 24.2
4th Qr. 1937 to 1st Qr. 1938	- 24.9	- 13.6
1st Qr. 1938 to 2nd Qr. 1938	+ 15.0	+ 37.1
1st Qr. 1938 vs. 1st Qr. 1937	- 6.5	- 8.7
2nd Qr. 1938 vs. 2nd Qr. 1937	- 20.5	- 19.9

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared with 1935. Dollar sales of the 82 wholesalers were up 45.3 percent compared with a 46.3 percent increase in pay roll and a 23.7 percent rise in stocks on hand at the end of the year. For the 41 manufacturers' sales branches, sales were up 57.9 percent; pay roll increased 51.5 percent, and stocks rose 48.7 percent.

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
82 Service and limited-function wholesalers	45.3	46.3	23.7
41 Manufacturers' sales branches	57.9	51.5	48.7

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 82 wholesalers and 41 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale store, restaurant and hotel equipment and supplies business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and wholesalers that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale store, restaurant and hotel equipment and supplies business, those with sales for the year 1935 of less than $25,000 were also omitted.

25% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale store, restaurant and hotel equipment and supplies houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 82 wholesalers represented 12 percent of the number and accounted for 25 percent of the business for all wholesalers in 1935, and the 41 manufacturers' sales branches represented 51 percent of the number and accounted for 78 percent of the total sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Cosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

STORE, RESTAURANT AND HOTEL EQUIPMENT AND SUPPLIES

TABLE 1.–NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales Year 1937	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr. 1937 To 2nd Qr. 1938
	Establishments %	Net Sales %		(add 000)	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	12	25	82	$16,485	$3,407	$4,610	$4,228	$4,240	$3,186	$3,664	- 6.5	-20.5
Middle Atlantic	11	34	29	7,520	1,477	2,123	1,948	1,972	1,409	1,577	- 4.6	-25.7
East North Central	16	22	25	4,040	903	1,192	1,028	920	718	868	-20.5	-27.2
West North Central	16	27	7	775	191	166	248	170	196	195	+ 2.6	+17.5
South Atlantic	10	15	4	730	135	218	181	196	122	195	- 9.6	-10.6
West South Central	15	41	6	1,694	362	432	436	464	394	389	+ 8.8	-10.0
Pacific	7	6	5	591	126	159	151	155	126	147	0.0	- 7.5
Other divisions	9	27	6	1,135	213	320	239	363	221	293	+ 3.8	- 8.4
MANUFACTURERS' SALES BRANCHES												
UNITED STATES	51	73	41	23,323	4,652	7,270	6,486	4,915	4,246	5,821	- 8.7	-19.9
Middle Atlantic	1/	1/	6	4,391	808	1,882	1,354	947	673	1,102	-16.7	-14.0
East North Central	--	--	9	9,340	2,023	2,865	2,412	2,020	1,811	2,132	-10.5	-26.1
West North Central	--	--	5	1,048	369	620	458	401	369	563	0.0	- 9.2
Pacific	--	--	7	2,009	377	687	621	324	310	539	-17.8	-21.5
Other divisions	--	--	14	5,735	1,075	1,796	1,641	1,223	1,083	1,485	+ 0.7	-17.3

\+ Increase – Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
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CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

STORE, RESTAURANT AND HOTEL EQUIPMENT AND SUPPLIES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	12	25	82	$16,485	$13,739	$11,343	$2,226	$1,522	$2,251	$2,093	$1,619	45.3	46.3	23.7
Middle Atlantic	11	24	29	7,520	5,975	5,144	1,041	681	1,050	996	784	46.2	52.9	33.9
East North Central	16	22	25	4,040	3,413	2,765	500	358	424	389	314	46.1	39.7	35.0
West North Central	16	27	7	775	720	572	109	75	167	156	131	35.5	45.3	27.5
South Atlantic	10	15	4	730	780	465	92	68	71	75	62	50.5	35.3	14.5
East South Central	15	41	6	1,694	1,511	1,118	199	147	247	223	276	51.5	35.4	-10.5
Pacific	7	6	5	591	495	368	111	56	132	105	86	60.6	98.2	53.5
Other divisions	9	27	6	1,135	945	891	174	137	160	149	166	27.4	27.0	- 3.6
MANUFACTURERS' SALES BRANCHES														
UNITED STATES	51	78	41	23,323	18,605	14,770	3,461	2,285	1,688	1,483	1,135	57.9	51.5	48.7
Middle Atlantic	1/	1/	6	4,391	2,966	2,155	271	125	159	148	107	103.8	116.8	48.6
East North Central	--	--	9	9,340	7,749	7,077	1,226	1,607	984	906	593	32.0	38.5	65.9
West North Central	--	--	5	1,846	1,235	901	137	75	65	73	67	105.1	82.7	- 3.0
Pacific	--	--	7	2,009	1,764	1,450	342	205	253	192	193	38.6	66.8	31.1
Other divisions	--	--	14	5,755	4,591	3,187	485	273	227	164	175	79.9	77.7	29.7

-- Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

Preliminary report
(4 pages)

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Census Survey of Business: 1937-38
Wholesale Distribution

SURGICAL, MEDICAL AND HOSPITAL EQUIPMENT AND SUPPLIES

Dollar sales of 56 wholesalers of surgical, medical and hospital equipment and supplies -- identical establishments accounting for 42 percent of the total business of all service wholesalers specializing in this business in 1935, the latest year covered by a regular business census -- during the second quarter of 1938 were 5.8 percent less than sales for the first quarter and were 8.0 percent under sales for the second quarter of 1937. Considering 1937 as a whole, however, their sales were 17.7 percent above 1936 and 40.4 percent higher than for the year 1935.

In addition to the wholesalers, 78 manufacturers' sales branches reported for the Survey. Dollar sales for these branches decreased 4.8 percent in the second quarter as compared with the first quarter of 1938 and were also 4.8 percent below sales for the second quarter of 1937; but, their total sales for 1937 were 22.8 percent above 1936 and 38.8 percent higher than for 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	56	78
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 4.0	+ 9.4
2nd Qr. to 3rd Qr. 1937	+ 6.7	+ 0.6
3rd Qr. to 4th Qr. 1937	- 0.9	- 6.7
4th Qr. 1937 to 1st Qr. 1938	- 7.5	+ 6.6
1st Qr. 1938 to 2nd Qr. 1938	- 5.8	- 4.8
1st Qr. 1938 vs. 1st Qr. 1937	+ 1.6	+ 9.4
2nd Qr. 1938 vs. 2nd Qr. 1937	- 8.0	- 4.8

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 as compared with 1935. Dollar sales of the 56 wholesalers were up 40.4 percent as compared with a 38.0 percent rise in pay roll and 35.6 percent increase in stocks on hand at the close of the year. Likewise, sales of the 78 manufacturers' sales branches increased 38.8 percent with a 30.9 percent rise in pay roll, while stocks were up 47.8 percent.

	Percent increase, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
56 Service and limited-function wholesalers	40.4	38.0	35.6
78 Manufacturers' sales branches	38.8	30.9	47.8

These and other facts pertaining to sales, pay roll and stocks of the wholesale surgical, medical and hospital equipment establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 56 wholesalers and 78 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale surgical, medical and hospital equipment business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Branches and wholesalers that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the wholesale surgical, medical and hospital equipment business, those with sales for the year 1935 of less than $25,000 were also omitted.

42% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale surgical, medical and hospital equipment houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 56 wholesalers represented 28 percent of the number and accounted for 42 percent of the sales for this classification in 1935 and the 78 manufacturers' sales branches represented 67 percent of the number and accounted for 53 percent of the business of all branches in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trades and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

SURGICAL, MEDICAL AND HOSPITAL EQUIPMENT AND SUPPLIES

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net * Sales Year 1937 (add 000)	Net Sales By Quarters (add 000)						Percent Change	
					1937				1938			
	Establishments %	Net * Sales %			1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	1st Qr 1937 To 1st Qr 1938	2nd Qr 1937 To 2nd Qr. 1938
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	28	42	56	$15,478	$3,643	$5,789	$4,041	$4,005	$3,703	$3,487	+ 1.6	- 8.0
Middle Atlantic	32	53	27	6,104	1,468	1,475	1,580	1,581	1,436	1,305	- 2.2	-11.5
East North Central	27	30	10	3,673	914	895	939	925	951	927	+ 4.0	+ 3.6
West North Central	33	60	7	3,410	717	836	936	921	808	778	+12.7	- 6.9
Pacific	15	42	4	964	218	236	245	265	214	215	- 1.8	- 8.9
Other Divisions	24	27	8	1,327	326	347	341	313	294	262	- 9.8	-24.5
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	67	53	78	13,792	3,267	3,575	3,596	3,354	3,575	3,405	+ 9.4	- 4.8
Middle Atlantic	1/	1/	17	5,660	1,445	1,418	1,340	1,457	1,478	1,419	+ 2.3	+ 0.1
East North Central	--	--	14	2,043	516	524	539	464	564	497	+ 9.3	- 5.2
West North Central	--	--	11	1,259	302	285	296	276	290	257	- 4.0	+25.3
South Atlantic	--	--	10	1,145	263	289	336	257	310	307	+17.9	+ 6.2
West South Central	--	--	8	853	195	198	230	230	241	265	+23.6	+33.8
Pacific	--	--	10	1,560	296	486	413	365	336	276	+13.5	-43.2
Other Divisions	--	--	8	1,278	250	375	348	305	356	284	+42.4	-24.3

\+ Increase — Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38 WHOLESALE DISTRIBUTION

SURGICAL, MEDICAL AND HOSPITAL EQUIPMENT AND SUPPLIES

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	Net* Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	28	42	56	$15,478	$13,151	$11,026	$2,897	$1,665	$2,398	$2,211	$1,769	40.4	38.0	35.6
Middle Atlantic	32	53	27	5,104	5,478	4,758	811	656	1,132	1,036	767	28.3	23.6	47.6
East North Central	27	30	10	2,673	2,903	2,357	541	393	432	419	333	55.8	64.9	30.0
West North Central	33	60	7	3,410	2,758	2,073	650	428	494	442	365	64.5	54.0	35.3
Pacific	15	42	4	964	891	740	157	138	181	170	151	30.3	13.8	19.9
Other Divisions	24	27	8	1,327	1,121	1,098	138	121	158	144	153	20.9	14.0	3.3
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	67	53	78	13,792	11,235	9,929	1,889	1,443	961	747	650	38.8	30.9	47.8
Middle Atlantic	1/	1/	17	5,660	4,977	4,278	671	553	379	322	256	32.3	21.3	48.6
East North Central	--	--	14	2,045	1,725	1,600	328	253	163	115	95	27.7	29.3	71.6
West North Central	--	--	11	1,259	919	868	185	135	95	75	60	45.0	37.0	58.3
South Atlantic	--	--	10	1,145	862	770	172	121	71	58	51	48.7	42.1	39.2
West South Central	--	--	6	853	752	621	133	101	66	44	55	37.4	31.7	20.0
Pacific	--	--	10	1,560	1,039	952	224	156	125	88	91	63.9	43.6	37.4
Other Divisions	--	--	8	1,272	960	850	182	124	62	45	43	49.6	46.8	44.2

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
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SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
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Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution
TOBACCO AND ITS PRODUCTS (EXCEPT LEAF)

Net sales of 309 wholesale tobacco distributors, representing all parts of the country, increased 14.3 percent in the second quarter over the first quarter of 1938. Sales were off 1.6 percent in the second quarter of 1938 as compared with the second quarter of 1937. For the year 1937, sales were 20.8 percent higher than for the year 1935, the latest covered by a regular business census. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the first report issued in connection with the Census Survey of Business for 1937-38.

During 1937, sales of the 309 tobacco houses increased sharply (19.2%) from the first to the second quarter, then rose moderately (4.9%) in the third quarter. From the third to the fourth quarter, however, they declined 2.8 percent. The decline continued (15.5%) during the first quarter of 1938, but the increase in the second quarter of this year was sufficient to show a slight gain (0.4%) for the first half of 1938 as compared with the first half of 1937.

The percentage changes in net sales of these wholesalers (without adjustments for seasonal variation) are given by quarters, for the year 1937 and the first half of 1938, in summary for the United States and by geographic divisions below.

COMPARISON OF SALES BY QUARTERS

Geographic Division	Number of Establishments	Percent increase (+) or decrease (-) in net sales: 1st Qr. to 2nd Qr. 1937	2nd Qr. to 3rd Qr. 1937	3rd Qr. to 4th Qr. 1937	4th Qr. 1937 to 1st Qr. 1938	1st Qr. 1938 to 2nd Qr. 1938	1st Qr. 1937 to 1st Qr. 1938	2nd Qr. 1937 to 2nd Qr. 1938
UNITED STATES	309	19.2	4.9	- 2.8	- 15.5	14.3	2.6	- 1.6
New England	25	+ 23.7	+ 11.4	- 8.4	- 16.9	+ 22.1	+ 5.0	+ 3.6
Middle Atlantic States	87	+ 24.6	+ 9.5	- 2.8	- 17.7	+ 17.7	+ 9.1	+ 3.1
East North Central	66	+ 18.0	+ 6.9	- 2.1	- 20.4	+ 15.3	- 1.7	- 4.0
West North Central	28	+ 15.7	+ 4.7	- 1.1	- 18.0	+ 12.0	- 1.7	- 4.8
South Atlantic	27	+ 8.2	+ 3.2	- 2.3	- 10.3	+ 7.7	- 2.1	- 2.6
East South Central	5	+ 12.3	+ 14.9	+ 2.2	- 5.4	+ 8.9	+ 24.7	+ 21.0
West South Central	13	+ 16.2	+ .9	+ 9.5	- 10.4	+ 4.9	+ 15.1	+ 3.8
Mountain	12	+ 13.3	+ 4.0	+ 0.0	- 12.5	+ 9.4	+ 3.1	- 0.5
Pacific	46	+ 19.3	- 2.4	- 3.9	- 11.6	+ 12.8	- 1.0	- 6.5

Changes by Geographic Divisions

Each geographic division showed an increase for the second quarter over the first quarter of 1937, and for all divisions but one, the Pacific, sales in the third quarter exceeded those in the second. Sales for six of the nine divisions declined in the fourth quarter and all divisions show decreases for the first quarter of 1938 as compared with the fourth quarter of 1937. Increases in the second quarter of this year were general, ranging from 4.9 percent for 13 houses in the West South Central States to 22.1 percent for 25 establishments in the New England States. It is significant to note, however, that in no geographic division was the percentage increase for the second quarter over the first quarter of this year as large as for the similar period of 1937.

1937 Compared with 1935

Considered on an annual basis, sales of the 309 tobacco houses increased from $202,569,000 in 1935 to $244,780,000 in 1937, a gain of 20.8 percent. During this same period, pay roll of these distributors increased from $5,648,000 to $6,545,000, or 15.9 percent, and

stocks on hand at the end of the year were up 20.1 percent from $9,882,000 to $11,867,000. The figures by years are given below:

YEAR	NET SALES	PAY ROLL	STOCKS ON HAND END OF YEAR
1937	$244,730,000	$6,545,000	$11,867,000
1936	$224,645,000	Not available	$11,419,000
1935	$202,569,000	$5,648,000	$ 9,882,000
Percent change 1935 to 1937:	+ 20.8%	+15.9%	+20.1%

These and many other facts pertaining to the 309 establishments are given in the attached tables by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 309 wholesale tobacco establishments which submitted returns for the current Census Survey of Business prior to the closing date. This report is not intended to present a complete picture of the wholesale tobacco trade. The canvass for the Survey was conducted by mail from a list composed only of establishments included in the 1935 Census of Business. Establishments which came into business subsequent to January 1, 1935 are not canvassed, and those which ceased operations prior to June 30 of this year are omitted. As they account for a negligible portion of the wholesale tobacco trade, distributors whose sales for the year 1935 amounted to less than $25,000 were also omitted from the mailing list.

26% Sample

Reporting for this Survey is purely on a voluntary basis, hence, not all houses contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. The houses included in this release are limited, in order to provide reliable trend information, to those which operated as wholesale tobacco distributors for the entire year 1935 and which still operate in a similar manner. The importance of the 309 houses to the wholesale tobacco trade is shown by the fact that they represented 14 percent of the total number and accounted for 26 percent of the sales of all service and limited-function wholesale tobacco distributors in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and sales, of these distributors is given by geographic divisions in the first two columns of Tables 1 and 2.

Wholesale Tobacco Distributors Described

Wholesale tobacco distributors are defined for the purpose of this report, as service and limited-function (mail-order, cash-and-carry, and wagon distributor) wholesalers engaged primarily in selling tobacco products (cigars, cigarettes, smoking tobacco, etc.) at wholesale. Many of them sell smokers' supplies and some confectionery, groceries, paper and other related products. Some also sell at retail as well as at wholesale, but only those engaged chiefly in selling tobacco products in a wholesale manner are included in this release. Sales branches and offices owned by tobacco manufacturers and operated primarily for the disposal of their products, as well as agency distributors, are omitted from this report.

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This is the first wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

TOBACCO AND ITS PRODUCTS (except leaf)

TABLE 1.--NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS BY GEOGRAPHIC DIVISIONS

DIVISION	SAMPLE BASED ON 1935 CENSUS		NO. OF ESTABLISHMENTS REPORTING 1937-38 SURVEY	NET SALES YEAR 1937 (add 000)	NET SALES BY QUARTERS (add 000)						PERCENT CHANGE	
					1937				1938		1ST QR. 1937 TO 1ST QR. 1938	2ND QR. 1937 TO 2ND QR. 1938
	ESTABLISHMENTS %	※ NET SALES %			1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30	3RD QR. July 1 Sept. 30	4TH QR. Oct. 1 Dec. 31	1ST QR. Jan. 1 Mar. 31	2ND QR. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	14	26	309	$244,780	$52,570	$62,644	$65,684	$63,882	$53,961	$61,676	+ 2.6	- 1.6
Service wholesalers	14	27	274	240,608	51,645	61,589	64,587	62,787	52,995	60,595	+ 2.6	- 1.6
Cash-and-carry wholesalers	19	15	27	3,236	733	822	839	842	744	849	+ 1.5	+ 3.3
Wagon distributors	4	4	8	936	192	233	258	253	222	232	+15.6	- 0.4
Geographic Divisions												
New England	13	16	25	15,315	3,140	3,884	4,327	3,964	3,296	4,024	+5.0	+3.6
Middle Atlantic	14	24	87	72,390	14,665	18,266	20,009	19,450	16,004	18,836	+ 9.1	+3.1
East North Central	12	16	66	36,944	7,903	9,322	9,966	9,753	7,766	8,953	- 1.7	- 4.0
West North Central	12	33	28	23,629	5,175	5,986	6,268	6,200	5,087	5,698	- 1.7	- 4.8
South Atlantic	13	25	27	21,898	5,103	5,523	5,701	5,571	4,996	5,382	- 2.1	- 2.6
East South Central	8	12	5	2,773	586	658	756	773	731	796	+ 24.7	+ 21.0
West South Central	10	12	13	6,010	1,301	1,512	1,526	1,671	1,497	1,570	+15.1	+ 3.8
Mountain	18	19	12	3,483	776	879	914	914	800	875	+ 3.1	- 0.5
Pacific	28	62	46	62,338	13,921	16,614	16,217	15,586	13,784	15,542	- 1.0	- 6.5

+ INCREASE - DECREASE

※ PERCENTAGES IN THIS COLUMN REPRESENT 1935 SALES OF ESTABLISHMENTS REPORTING FOR 1937-38 SURVEY DIVIDED BY TOTAL SALES FOR 1935, BY CLASSIFICATIONS.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

TOBACCO AND ITS PRODUCTS (except leaf)

TABLE 2.–SALES, PAYROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Sample Based on 1935 Census		No. of Establishments Reporting–ing 1937-38 Survey	Net Sales (add 000)			Pay Roll** (add 000)		Stocks On Hand End Of Year (add 000)			Percent Increase 1935 to 1937		
	Establishments %	* Net Sales %		1937	1936	1935	1937	1935	1937	1936	1935	Net Sales	Pay Roll	Stocks
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	14	26	309	$244,780	$224,645	$202,569	$6,545	$5,648	$11,867	$11,419	$9,882	20.8	15.9	20.1
Service wholesalers	14	27	274	240,608	220,880	199,083	6,468	5,584	11,636	11,196	9,742	20.9	15.8	19.4
Cash-and-carry wholesalers	19	15	27	3,236	3,037	2,872	64	53	201	198	125	12.7	20.8	60.8
Wagon distributors	4	4	8	936	728	614	13	11	30	25	15	52.4	18.2	100.0
Geographic Divisions														
New England	13	16	25	15,315	13,380	11,394	379	338	726	639	553	34.4	12.1	31.3
Middle Atlantic	14	24	87	72,390	62,744	57,223	2,513	2,140	3,158	2,673	2,303	26.5	17.4	37.1
East North Central	12	16	66	36,944	33,729	29,811	1,065	896	1,478	1,324	1,272	23.9	18.9	16.2
West North Central	12	33	28	23,629	21,007	17,582	491	369	1,155	983	784	34.4	33.1	47.3
South Atlantic	13	25	27	21,898	21,999	19,760	737	609	834	878	818	10.8	21.0	2.0
East South Central	8	12	5	2,773	2,350	2,219	82	69	175	150	138	25.0	18.8	26.8
West South Central	10	12	13	6,010	5,499	4,732	118	105	237	228	225	27.0	12.4	5.3
Mountain	18	19	12	3,483	3,339	2,820	99	81	162	136	119	23.5	22.2	36.1
Pacific	28	62	46	62,336	60,598	57,028	1,061	1,041	3,942	4,408	3,670	9.3	1.9	7.4

* Percentages In This Column Represent 1935 Sales Of Establishments Reporting For 1937-38 Survey Divided By Total Sales For 1935, By Classifications.

** Pay Roll Not Available For Year 1936. Pay Roll Includes Compensation Of Both Full-time And Part-time Employees, But Not Of Proprietors And Firm Members Of Unincorporated Businesses. – Decrease

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

Immediate
Release

DEPARTMENT OF COMMERCE
Bureau of the Census
Washington

Preliminary report
(4 pages)

Census Survey of Business: 1937-38
Wholesale Distribution

WINE AND LIQUOR TRADE

Dollar sales of 220 wine and liquor wholesalers -- identical establishments accounting for 23 percent of the sales for all houses specializing in this business during 1935, the latest year covered by a regular business census -- increased 14.1 percent in the second quarter over the first quarter of 1938, and were slightly above (0.3%) sales for the second quarter of 1937. Considered on an annual basis, their 1937 business was 14.7 percent above 1936 and 59.2 percent higher than for the year 1935.

In addition to the wholesalers, 46 manufacturers' sales branches, owned by makers of wines and liquors and operated primarily for the disposal of their products, are included in this Survey. Dollar sales for these branches increased 15.6 percent in the second quarter as compared with the first quarter of this year, but were 10.4 percent below sales for the second quarter of 1937. Their total 1937 sales were up 4.9 percent compared with 1936 and 24.3 percent above 1935. These are among the conclusions announced today by William L. Austin, Director, Bureau of the Census, in the latest report issued in connection with the current Survey of Business.

COMPARISON OF SALES BY QUARTERS

Percentage changes in dollar sales (without adjustments for seasonal variation) by quarters, for the year 1937 and the first half of 1938, are given below:

PERIOD	Service and limited-function wholesalers	Manufacturers' sales branches
Number of establishments included	220	46
Percent increase (+) or decrease (-) in sales		
1st Qr. to 2nd Qr. 1937	+ 1.5	+ 4.6
2nd Qr. to 3rd Qr. 1937	- 3.8	+ 1.3
3rd Qr. to 4th Qr. 1937	+ 42.5	+ 48.1
4th Qr. 1937 to 1st Qr. 1938	- 35.9	- 48.3
1st Qr. 1938 to 2nd Qr. 1938	+ 14.1	+ 15.6
1st Qr. 1938 vs. 1st Qr. 1937	- 10.8	- 18.9
2nd Qr. 1938 vs. 2nd Qr. 1937	+ 0.3	- 10.4

1937 Compared with 1935

Substantial increases are noted in sales, pay roll and stocks for 1937 compared with 1935. Dollar sales of the 220 wholesalers were up 59.2 percent as compared with a 49.2 percent pay roll rise, while stocks on hand at the close of the year increased 32.9 percent. For the 46 manufacturers' sales branches, dollar sales increased 24.3 percent; pay roll rose 14.1 percent, while stocks decreased 32.2 percent.

	Percentage increases, 1937 over 1935		
	Sales	Pay roll	Stocks (end of year)
220 Service and limited-function wholesalers	59.2	49.2	32.9
46 Manufacturers' sales branches	24.3	14.1	- 32.2

These and other facts pertaining to sales, pay roll and stocks of the establishments included in this Survey are given in Tables 1 and 2, by geographic divisions.

SCOPE OF SURVEY

The data contained in this report were supplied by 220 wholesalers and 46 manufacturers' sales branches which submitted returns for the Survey prior to the closing date for this preliminary release. This report is not intended to present a complete picture of the wholesale wine and liquor business. The canvass for the Survey was conducted by mail from lists composed only of establishments included in the 1935 Census of Business. Wholesalers and branches that came into business subsequent to January 1, 1935, were not canvassed, and those ceasing operations prior to June 30 of this year were omitted. As they account for a negligible portion of the total business, those with sales for the year 1935 of less than $25,000 were also omitted.

23% Sample

Reporting for this Survey was purely on a voluntary basis, hence, not all establishments contacted submitted returns. The number is further limited by the omission of those which changed their general location or the nature of their operations since 1935. In order to provide reliable trend information, establishments included are limited to those operating as wholesale wine and liquor houses for the entire year of 1935, and which still operate in a similar manner.

The importance of those included is shown by the fact that the 220 wholesalers represented 15 percent of the number and accounted for 23 percent of the business for all wholesalers in 1935, and the 46 manufacturers' sales branches represented 40 percent of the number and accounted for 57 percent of the total sales for this classification in 1935. For convenience in evaluating their importance, the percent sample, both of establishments and of sales, is given in the first two columns of Tables 1 and 2, by geographic divisions.

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This is the latest wholesale report issued in connection with the Census Survey of Business: 1937-38. It will be followed promptly by similar releases for other trades and later by more detailed studies.

The current Census Survey of Business includes retail as well as wholesale trade and is nation-wide in scope. It is being conducted by the Bureau of the Census, with funds provided by the Works Progress Administration. The project is under the direction of Fred A. Gosnell, Chief Statistician, who was also in charge of previous Business Censuses. Wholesale trade reports are prepared under the immediate supervision of John Albright.

CENSUS SURVEY OF BUSINESS: 1937-38 — WHOLESALE DISTRIBUTION

WINE AND LIQUOR TRADE

TABLE 1.-NET SALES BY QUARTERS: 1937 AND FIRST HALF OF 1938

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	Size Of Sample Compared With 1935 Census		No. Of Establishments Included In 1937-38 Survey	Net Sales Year 1937 ($000)	Net Sales By Quarters ($000)						Percent Change	
					1937				1938		1st Qr. 1937 To 1st Qr. 1938	2nd Qr. 1937 To 2nd Qr. 1938
	Establishments %	Net Sales %			1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30	3rd Qr. July 1 Sept. 30	4th Qr. Oct. 1 Dec. 31	1st Qr. Jan. 1 Mar. 31	2nd Qr. April 1 June 30		
SERVICE AND LIMITED-FUNCTION WHOLESALERS												
UNITED STATES	15	23	220	$155,817	$38,563	$36,089	$34,706	$49,459	$31,718	$36,205	-10.8	+ 0.3
New England	18	22	24	15,050	3,306	3,682	3,603	4,459	3,219	3,738	- 2.6	+ 1.5
Middle Atlantic	19	29	50	67,831	14,490	15,077	15,174	23,100	13,286	15,550	- 8.2	+ 3.1
East North Central	15	17	57	22,336	5,390	5,347	5,078	6,523	4,356	5,031	-19.2	- 5.9
West North Central	18	26	17	12,499	3,104	2,836	2,553	4,006	2,660	3,003	-14.3	+ 5.9
South Atlantic	11	16	13	7,870	2,137	1,862	1,473	2,398	1,804	1,696	-15.6	- 8.9
East South Central	14	22	7	11,051	2,729	2,626	2,265	3,431	2,390	2,304	-12.4	-12.3
West South Central	8	23	6									
Mountain	19	43	9	4,787	1,045	1,164	1,168	1,410	980	1,131	- 6.2	- 2.8
Pacific	12	24	37	14,391	3,372	3,495	3,392	4,132	3,023	3,752	-10.4	+ 7.4
MANUFACTURERS' SALES BRANCHES (with stocks)												
UNITED STATES	40	57	46	138,844	29,691	31,060	31,473	46,620	24,085	27,829	-18.9	-10.4
Middle Atlantic	1/	1/	8	46,808	8,970	10,144	10,640	17,054	7,296	8,234	-18.7	-18.8
East North Central	--	--	11	35,852	8,261	8,491	8,529	10,571	5,697	7,329	-31.0	-13.7
Mountain	--	--	5	2,320	529	572	521	698	389	470	-26.5	-17.8
Pacific	--	--	13	23,781	5,925	5,029	5,487	7,340	4,564	5,204	-23.0	+ 3.5
Other Divisions	--	--	9	30,083	6,006	6,824	6,296	10,957	6,139	6,602	+ 2.2	- 3.3

\+ Increase — Decrease

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
WEST SOUTH CENTRAL - (Ark., La., Okla., Tex.)
MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)

CENSUS SURVEY OF BUSINESS: 1937-38

WHOLESALE DISTRIBUTION

WINE AND LIQUOR TRADE

TABLE 2.- SALES, PAY ROLL AND STOCKS: 1937, 1936 AND 1935

FOR IDENTICAL ESTABLISHMENTS, BY GEOGRAPHIC DIVISIONS

DIVISION	SIZE OF SAMPLE COMPARED WITH 1935 CENSUS		NO. OF ESTABLISHMENTS INCLUDED IN 1937-38 SURVEY	NET SALES (add 000)			PAY ROLL** (add 000)		STOCKS ON HAND END OF YEAR (add 000)			PERCENT INCREASE 1935 to 1937		
	ESTABLISHMENTS %	NET* SALES %		1937	1936	1935	1937	1935	1937	1936	1935	NET SALES	PAY ROLL	STOCKS
SERVICE AND LIMITED-FUNCTION WHOLESALERS														
UNITED STATES	15	23	220	$155,817	$135,833	$ 97,847	$9,001	$6,031	$19,087	$17,243	$14,359	59.2	49.2	32.9
New England	18	22	24	15,050	12,674	9,915	1,008	711	2,008	1,580	1,896	51.8	41.8	54.9
Middle Atlantic	19	29	50	67,831	55,641	39,974	3,893	2,316	8,100	7,139	6,085	88.6	68.1	33.1
East North Central	15	17	57	22,336	20,280	13,648	1,100	853	2,542	2,313	2,428	63.7	29.0	4.3
West North Central	16	26	17	12,499	11,016	8,451	628	480	1,845	2,194	1,369	47.9	30.8	32.8
South Atlantic	11	16	13	7,970	7,978	6,339	597	401	887	755	585	24.8	48.9	57.0
East South Central	14	22	7	11,051	8,977	8,269	673	439	1,429	1,156	855	33.6	53.3	67.1
West South Central	8	23	6											
Mountain	19	43	9	4,787	4,598	3,289	217	144	470	449	271	45.5	50.7	73.4
Pacific	12	24	37	14,391	13,869	11,962	885	687	1,806	1,667	1,460	20.3	28.8	23.7
MANUFACTURERS' SALES BRANCHES (with stocks)														
UNITED STATES	40	57	46	138,844	132,395	111,691	3,836	3,361	3,680	5,955	5,428	24.3	14.1	-32.2
Middle Atlantic	1/	1/	8	46,808	46,175	45,909	1,553	1,343	1,685	3,550	2,317	2.0	15.6	-27.3
East North Central	--	--	11	35,652	35,006	25,584	784	569	775	883	1,278	40.1	37.8	-39.4
Mountain	--	--	5	2,320	2,376	2,533	60	71	113	118	149	- 8.4	-15.5	-24.2
Pacific	--	--	13	23,781	22,570	16,616	618	660	801	1,046	1,390	43.1	- 6.4	-42.4
Other divisions	--	--	9	30,083	26,266	21,049	821	718	306	358	294	42.9	14.3	4.1

- DECREASE

* Percentages in this column represent 1935 sales of establishments included in this survey, divided by total 1935 sales of each classification.

** Pay roll not available for year 1936. Pay roll includes compensation of both full-time and part-time employees, but not of proprietors and firm members of unincorporated businesses.

1/ 1935 figures not available for calculating percent sample by geographic divisions.

States Comprising Geographic Divisions:

NEW ENGLAND - (Conn., Maine, Mass., N. H., R. I., Vt.)
MIDDLE ATLANTIC - (N. J., N. Y., Pa.)
EAST NORTH CENTRAL - (Ill., Ind., Mich., Ohio, Wis.)
WEST NORTH CENTRAL - (Iowa, Kans., Minn., Mo., Nebr., N. Dak., S. Dak.)
SOUTH ATLANTIC - (Del., D. C., Fla., Ga., Md., N. C., S. C., Va., W. Va.)
EAST SOUTH CENTRAL - (Ala., Ky., Miss., Tenn.)
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MOUNTAIN - (Ariz., Colo., Idaho, Mont., Nev., N. Mex., Utah, Wyo.)
PACIFIC - (Calif., Oreg., Wash.)